SIMS User Reference Guide

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Introduction

Contact us

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SIMS Requirements

	 **WINDOWS**
OPERATING SYSTEMS	Windows Server 2003, Windows 2008, Windows XP, Windows Vista, or Windows 7
STANDALONE SYSTEM	At least a Pentium III with 256MB of RAM
STANDALONE HARD DISK SPACE	About 75 MB for the program • An additional 330 MB if the movies are stored on this computer • Additional space for MSSQL Server and the SIMS data file
SERVER SYSTEM	Windows Server 2003, XP, or Vista on at least a Pentium III (a dual processor is even better) with 256 MB of RAM and SQL Server 2005
SERVER HARD DISK SPACE	About 100 MB for the program • An additional 330 MB if the movies are stored on this computer • Additional space for the data file if stored on this computer (See below under DATA FILE)

CLIENT SYSTEM	At least a Pentium III with 256 MB of RAM and a reliable network connection to the server, using the TCP/IP protocol
CLIENT/SERVER NETWORK	The server and client machines have to be able to use the TCP/IP network protocol (supplied with Windows Server 2003, Windows XP, and Windows Vista) to communicate with SQL Server
WEB CLIENT	Internet Explorer 6.0 or higher
DATA FILE	Rule of thumb: Each SQL Server data file is more than 2K per record in the main files So, a 10,000 record document database can be expected to be over 25-30 MB on disk (there are records in the other tables)
LICENSING	One license for each person running a copy of .NET SIMS. No license for the server machine unless someone is running a client SIMS at the server machine No license for Web Browser clients; these are read-only connections Licensing can be linked to a particular machine through a local Software Security Device, or can be associated with a maximum number of users at any machine through Sentinel LM, NetSentinel, or Sentinel SuperPro Net Software Security Device

Getting Started

Getting Started - Introduction

Thank you and congratulations for choosing SIMS. SIMS is a user-friendly industrial security management tool, comprised of several integrated relational databases plus various utilities, that makes the control of classified documents, facilities, contracts, and personnel (employees, consultants, and visitors) easier, more effective, and virtually error free. Used properly, SIMS will save time, reduce your workload and prevent most common security violations.

In order to effectively implement and use SIMS in your security operation, you will first need to understand your overall security job functions, in terms of what you want to accomplish and how you want to get it done. For most industrial and government security operations, the NISPOM is the principle guiding document that describes the security functions that need to be implemented.

Facility clearances and storage levels, personnel security clearances and briefings, special access requirements and briefings, document control, incoming visitor control, and outgoing visit requests are some of the essential conceptual elements of most security operations. It is in the implementation of these concepts that SIMS supports these tasks.

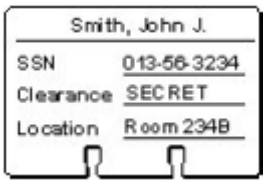
The second important aspect of effectively using SIMS has to do with your mastery of the computer system on which SIMS has been installed. Do you understand the meaning of terms like "drag and drop," "pointing and clicking," "opening and closing windows," "creating, opening, and closing files," etc? If these terms are foreign to you, then you should consider a brief tutorial on how to effectively use your computer system before using SIMS.

SIMS is very user friendly, with online help always available. Additionally, we offer on-site training at your facility for a reasonable cost. There is a built-in SIMS tutorial that you can use for self-directed training, and SIMS technical support staff can be accessed as follows:

Email	techsupport@simssoftware.com
Phone	858.481.9292
Fax	858.481.3557
Hours	Monday - Thursday, 7:00 am – 3:00 pm, Pacific Time
	Friday, 7:00 am – noon, Pacific Time

Introductory SIMS Concepts

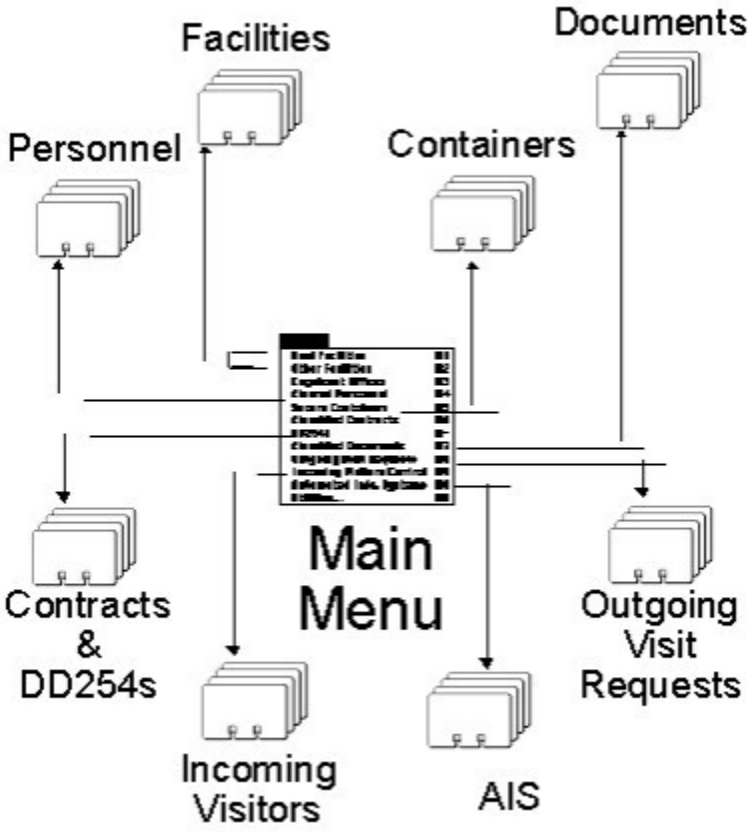
To understand what the SIMS program is, think of a Rolodex file in which you keep a set of cards with the same information on each of them. For example, it could be a set of cards, each containing a name, social security #, clearance, and the person's location.



It could be a set of cards with information on classified documents or containers.



SIMS is very much like a set of rolodex files, each of which is accessed directly from either the Main screen or the SIMS menu.



SIMS conventions

- An entry on an item is called a "record" rather than a card.
- A set of related records, like Personnel or Documents, is called a "module" rather than a rolodex.

Documentation and Online Help

All SIMS manuals are the form of online help.

Documentation and training videos are available from the Help menu or by clicking on the Help icon.

A SIMS manager can customize the Help URL by editing the field on the System Tab in System Customization.

Installing and Starting SIMS

Follow the appropriate instructions enclosed to install SIMS.

Please be certain that the SIMS Software Security Device - SSD (Sentinel Super Pro or Net Sentinel Pro) has been properly installed in the printer port (LPT1:) or USB port of the SIMS computer workstation, if this is a standalone installation. Note that the multi-user implementation of SIMS.NET employs a software-type SSD, not a hardware key. This is what the SIMS SSD looks like:

	
Parallel Port Software Security Device	**USB port Software Security Device**

Please keep track of your SIMS SSDs. You must have this device to run SIMS in a standalone configuration.

If you lose your SIMS Software Security Device(s), the SIMS Standalone or Lite program will not run and you will need to purchase an additional SIMS license(s).

Please see the SIMS Standalone Installation Instructions for more information on installing and configuring the Software Security Device.
If installing a Multi-User client-server version of SIMS, you will need to activate the software-based SIMS license. Please see the SIMS Multi-User Installation Instructions for more information on installation and license activation.

Starting SIMS

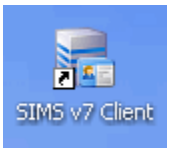
Starting SIMS Standalone and Multi-User Client

If SIMS has been installed as a Standalone or Lite workstation, simply doubleclick the "SIMS v7 Standalone" icon on your Windows desktop, or via the Start->Programs->SIMS Software->SIMS v7 Standalone, to start SIMS.



SIMS Standalone icon

If SIMS has been installed as a Multi-User environment and you are starting it from a Client workstation, simply double-click the "SIMS v7 Client" icon on your Windows desktop, or via the Start->Programs->SIMS Software->SIMS v7 Client, to start SIMS.



SIMS Client icon

If SIMS has been installed as a Multi-user environment with a ClickOnce Client, simply connect to the URL provided by your SIMS Administrator to start the SIMS v7 Client. An example URL is http://90.0.1.253/ClickOnce/SIMS.application.

Starting SIMS remotely

iPAD2 can remotely run a SIMS Client installation on a Windows computer, using the Jump remote desktop application on the iPad2 and a VPN connection.

If you're running the SIMS Multi-user version, which uses a software-based license, you can use either Remote Desktop (RDP) or Virtual Network Computing (VNC) connectivity. If running the SIMS Standalone or SIMS Lite, you must use VNC because the SIMS Standalone and SIMS LIte USB hardware key is not compatible with RDP.

Logging In

The login screen asks for a User identification (ID), Password, and Domain.

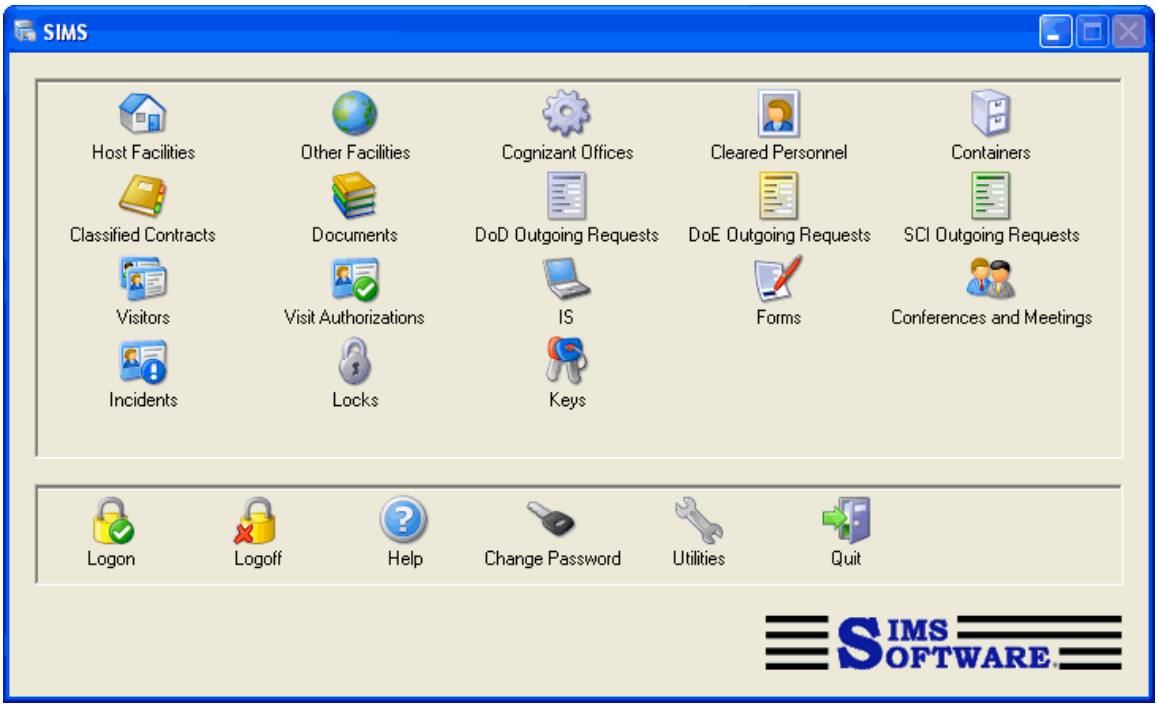
SIMS Login Page Fields

Field Name	Description
User	Enter the default User name: sims
Password	Enter the default Password: sims
Domain	Select the appropriate domain.

Note: The default User ID and Password should be changed as soon as possible after the installation. New user IDs and passwords may be added. See the Utilities > User Management Users section for more information.

SIMS Main Screen

The SIMS main screen is the starting point after logging into SIMS. SIMS has been designed to be user-friendly, with easily learned, full-screen interfaces for editing, modifying, adding, and deleting data in a consistent manner for all modules. A SIMS Manager can define access privileges to the different modules by going to User Management i n Utilities.



Each module in SIMS is represented by an icon. Click an icon to open that module. The **File** and **SIMS** menus offer the same choices as the main screen. Keyboard equivalents are listed in the menus.

The following table provides a brief overview of each module:

Icon	Description
	Host Facilities: Manages information regarding your facilities. Entries include facility names and addresses, clearance levels, granting agencies and dates granted, the facility cognizant security office and when the SPP was last updated.
	Other Facilities: Manages information regarding all other facilities with which you do business. Entries include facility names and addresses, clearance levels, granting agencies and dates granted, and the facility cognizant security office. Mailing lists, address checks, security points of contact, and dates of facility clearance verifications are all controlled.
	Cognizant Offices: Manages information regarding the names, addresses, and telephone numbers of all cognizant security offices.

	**Cleared Personnel**: Manages information about all employees and consultants that relates to personnel clearances, including clearance levels, special accesses, citizenship, place of birth, social security numbers, etc.
	**Containers**: Maintains an inventory of all containers used to store classified materials, including types of containers, levels of storage, locations, and personnel access.
	**Classified Contracts**: Contains information regarding all classified contracts, subcontracts, and DD254 forms.
	**Classified Documents**: Maintains an inventory of all classified documents, including document number, classification, document title, custodian, container, and other details.
	**DoD Outgoing Visit Requests**: Manages DoD visit requests going from your facility to other facilities and agencies.
	**DoE Outgoing Visit Requests**: Manages DoE visit requests going from your facility to other facilities and agencies.
	**SCI Outgoing Visit Requests**: Manages SCI visit requests going from your facility to other facilities and agencies.
	**Visitors**: Manages incoming visit requests from other companies and can generate visitor logs and badges for processing visitors to your facility.
	**Visit Authorizations**: Manages incoming visit requests from other companies and can generate visitor logs and badges for processing visitors to your facility.
	**IS**: Manages information regarding all approved Information Systems (IS) upon which classified processing/computing is to be performed.
	**Conferences and Meetings**: Tracks scheduled events and the incoming visitors and in-house personnel expected to attend. Also tracks the point of contact for the events and the associated classification level of topics.

	**Incidents**: Logs all security violations or events that need to be reported or tracked.
	**Locks**: Manages the inventory of all of the locks in the facility.
	**Keys**: Manages the inventory of all of the keys, key rings, and key hooks in the facility.
	**Logon**: Opens SIMS.NET when the user enters the appropriate ID and password.
	**Logoff**: Logs the current user out of SIMS.NET, without quitting the program.
	**Help**: Opens the online help system. This includes all the SIMS documentation in electronic format. The Help URL can be customized in the System Tab of System Customization.
	**Change Password**: Allows each user to change their own password. It is not visible when users login using LDAP / Active Directory authentication.
	**Utilities**: Contains system customization, default settings, password management, and administrative items.
	**Quit**: Closes the SIMS database and exits the program.

Each SIMS module is equipped for printing reports for accounting and auditing purposes. You can print a variety of predefined reports. SIMS generates security specific reports based on the information in the modules, including visit requests, document receipts, and courier authorizations.

Along with a complete database manager and report generator, SIMS can:

- Validate data entered for correct type and consistency
- Cross-check, at the audit level, all modules for inconsistencies and errors
- Prepare action item security reports for upcoming tasks

Setting Up Accounts For New SIMS Users

When you first create a new SIMS data file and log in with the default logins (User ID: sims; Password: sims) you have logged in as the System Manager. To create additional SIMS user accounts and to change the password of the System Manager, click the **Utilities** icon on the SIMS main screen and then click the User Management icon. See the User Management section for more information.

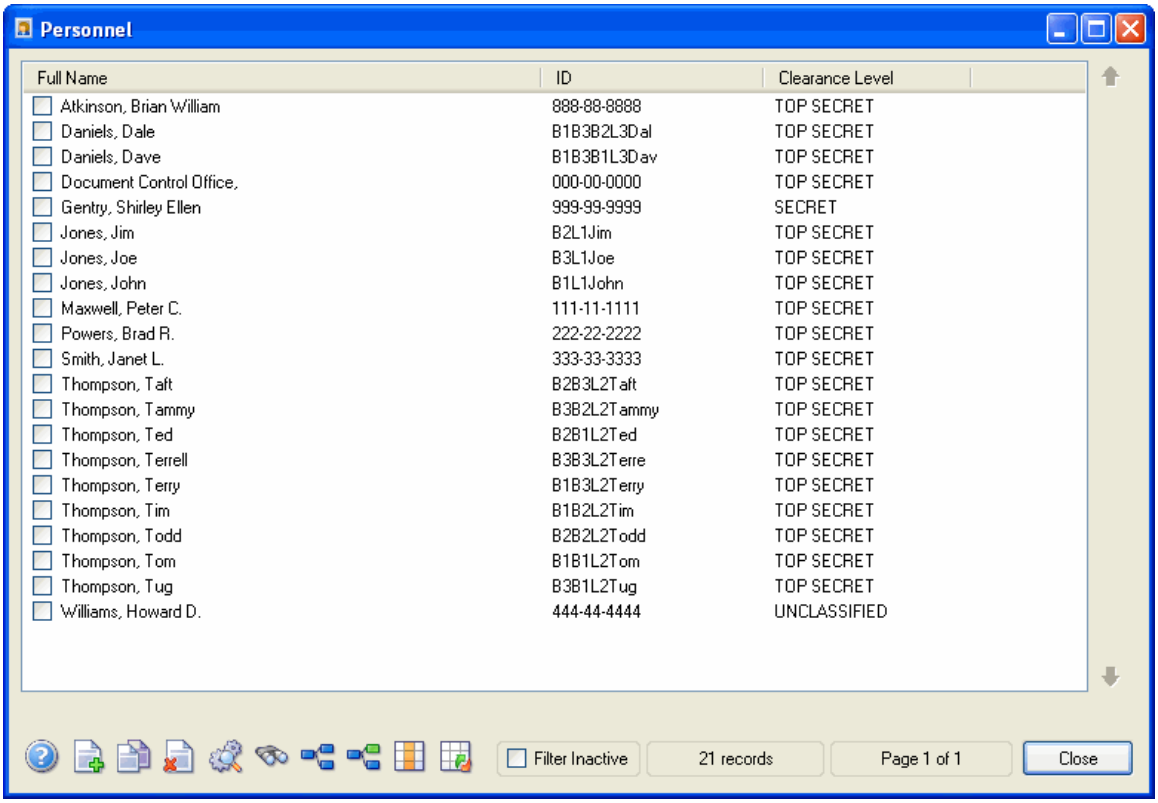
Output List Screen

When you open a module, you will see an output list screen that lists all the records in that module. If there are no records in the module, the screen is empty. All modules have the same type of output list screen. If Data Groups are being used and data group filtering for the selected module is turned on in the Data Group Filter tab in System Customization, only records that belong to the user's data group will display in the output list screen. Other user options and module access can be set by a SIMS manager by going to Utilities > User Management.

The Personnel output list screen is shown below as an example.

In each output list screen, you can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields. Refer to the topic "input screen" under each module name for further information about each input screen and its fields.


Personnel
Full Name
ID
Clearance Level
Atkinson, Brian William 888-88-8888 TOP SECRET
Daniels, Dale B1B3B2L3Dal TOP SECRET
Daniels, Dave B1B3B1L3Dav TOP SECRET
Document Control Office, 000-00-0000 TOP SECRET
Gentry, Shirley Ellen 999-99-9999 SECRET
Jones, Jim B2L1Jim TOP SECRET
Jones, Joe B3L1Joe TOP SECRET
Jones, John B1L1John TOP SECRET
Maxwell, Peter C. 111-11-1111 TOP SECRET
Powers, Brad R. 222-22-2222 TOP SECRET
Smith, Janet L. 333-33-3333 TOP SECRET
Thompson, Taft B2B3L2Taft TOP SECRET
Thompson, Tammy B3B2L2Tammy TOP SECRET
Thompson, Ted B2B1L2Ted TOP SECRET
Thompson, Terrell B3B3L2Terre TOP SECRET
Thompson, Terry B1B3L2Terry TOP SECRET
Thompson, Tim B1B2L2Tim TOP SECRET
Thompson, Todd B2B2L2Todd TOP SECRET
Thompson, Tom B1B1L2Tom TOP SECRET
Thompson, Tug B3B1L2Tug TOP SECRET
Williams, Howard D. 444-44-4444 UNCLASSIFIED
Filter Inactive
21 records
Page 1 of 1
Close

Output screen buttons
These commands also appear the **Command** Menu along with their keyboard equivalents.

Button	Description
	Open link to Help files.

	Add a new record to the database. After saving a new record, a new record is added automatically. This allows you to add records continuously until you click **Cancel**. In SIMS Utilities, auto-numbering can be set up such that each new record is automatically assigned a unique number.
	Make a copy of the selected record.
	Remove the selected record(s) from the database. The record will be deleted only if it is not referenced by other records in the SIMS database. If several records are selected and one of the records cannot be deleted, the others will be deleted.
	Query the database using the Query Editor.
	Query the database using the Quick Find "Query by Example" technique.
	Show all records in the database. After performing a search (i.e.quick find), choose this button to show the entire list of records again.
	Show only selected records. Highlight or check the records first and then choose this button to show only the selected records. See also the topic below on selecting records in the output list screen.
	Customize Output List Columns. Choose this button to customize user preferences such as sorting by columns, which tab will be displayed when a record is first opened or edited, whether or not archived records are filtered, as well as remembering module window location and size.
	Go to page...

Filter Inactive	If unchecked, both active and inactive records will display in the output list screen. If checked, only active records will display in the output list screen. There is also a per-user setting to default the inactive filter for each module. Open the module, then click the 'customize outputlist' in the toolbar at the bottom (second to last button). In the dialog, there is a checkbox for 'Filter Inactive'.

Selecting records in the Output List Screen

Record paging and check box selection are options that can be set in the System Customization Output Lists tab.

Record paging can be set for each module. If checked, the selected module will display all the records from the database at once. Instead of using the default page up/down keys, a scroll bar will allow the user to stroll up/down through the all the records. This is similar to SIMS 6 behavior and is the default behavior for all modules in SIMS Standalone.

Records in the output list can be highlighted or checked, depending on how the options are set in System Customization. If check box selection is disabled, users will only be able to highlight records in the output list. If check box selection is enabled, the user can highlight or check records in the output list screen. If records are both checked and highlighted, a warning dialog can be displayed for each user or the default behavior can be set for all users. Check box selection is disabled as the default in SIMS Standalone. These settings, however, can be changed in the System Customization Output Lists tab.

When checking records...

Check a record to select it. Double click a record to edit it.

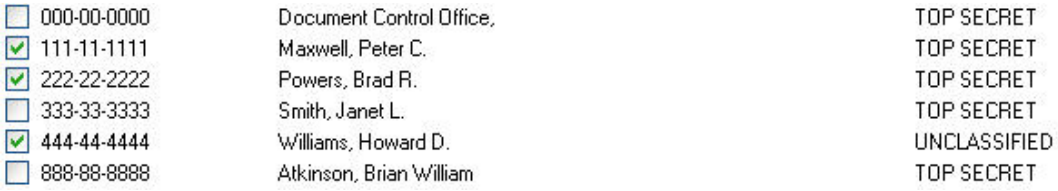
☐ 000-00-0000	Document Control Office,	TOP SECRET
☐ 111-11-1111	Maxwell, Peter C.	TOP SECRET
☑ 222-22-2222	Powers, Brad R.	TOP SECRET
☐ 333-33-3333	Smith, Janet L.	TOP SECRET
☐ 444-44-4444	Williams, Howard D.	UNCLASSIFIED
☐ 888-88-8888	Atkinson, Brian William	TOP SECRET

Selected Record

To select more than one record in a group, check each check box for the records you want to select.

☐ 000-00-0000	Document Control Office,	TOP SECRET
☑ 111-11-1111	Maxwell, Peter C.	TOP SECRET
☑ 222-22-2222	Powers, Brad R.	TOP SECRET
☑ 333-33-3333	Smith, Janet L.	TOP SECRET
☑ 444-44-4444	Williams, Howard D.	UNCLASSIFIED
☐ 888-88-8888	Atkinson, Brian William	TOP SECRET

Selected Group of Records



☐ 000-00-0000	Document Control Office,	TOP SECRET
☑ 111-11-1111	Maxwell, Peter C.	TOP SECRET
☑ 222-22-2222	Powers, Brad R.	TOP SECRET
☐ 333-33-3333	Smith, Janet L.	TOP SECRET
☑ 444-44-4444	Williams, Howard D.	UNCLASSIFIED
☐ 888-88-8888	Atkinson, Brian William	TOP SECRET

Selected Records

When highlighting records...

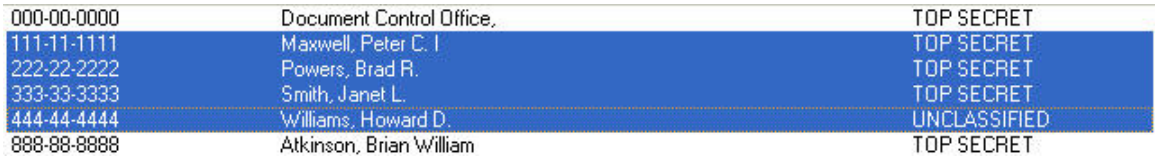
Click a record to select it. Double click a record to edit it.



000-00-0000	Document Control Office,	TOP SECRET
111-11-1111	Maxwell, Peter C.	TOP SECRET
222-22-2222	Powers, Brad R.	TOP SECRET
333-33-3333	Smith, Janet L.	TOP SECRET
444-44-4444	Williams, Howard D.	UNCLASSIFIED
888-88-8888	Atkinson, Brian William	TOP SECRET

Selected Record

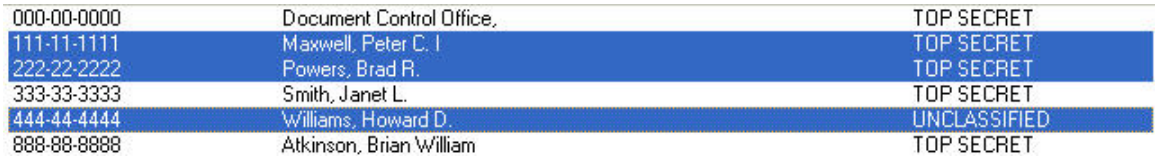
To select more than one record in a group, hold down the **Shift** key and click on the first record and last record that you want to select.



000-00-0000	Document Control Office,	TOP SECRET
111-11-1111	Maxwell, Peter C. I	TOP SECRET
222-22-2222	Powers, Brad R.	TOP SECRET
333-33-3333	Smith, Janet L.	TOP SECRET
444-44-4444	Williams, Howard D.	UNCLASSIFIED
888-88-8888	Atkinson, Brian William	TOP SECRET

Selected Records

To select individual records that are not in a group, hold down the **Ctrl** key and click each record one at a time.



000-00-0000	Document Control Office,	TOP SECRET
111-11-1111	Maxwell, Peter C. I	TOP SECRET
222-22-2222	Powers, Brad R.	TOP SECRET
333-33-3333	Smith, Janet L.	TOP SECRET
444-44-4444	Williams, Howard D.	UNCLASSIFIED
888-88-8888	Atkinson, Brian William	TOP SECRET

Selected Group of Records

Related Topics

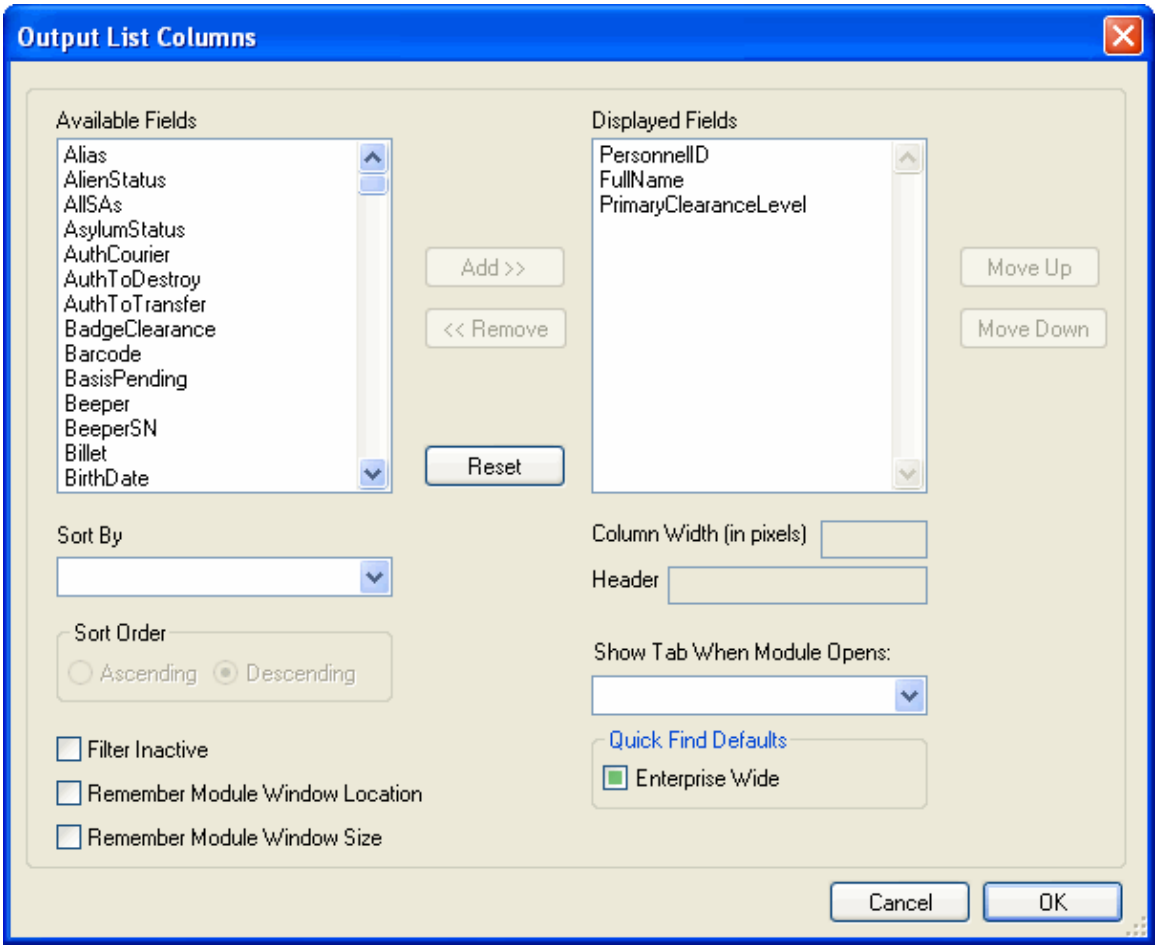
System Customization Colors

System Customization Output Lists

System Customization

Customizing Output List Columns

On any output list screen, click **Customize Output List Columns**  to customize user preferences such as sorting by columns, which tab will be displayed when a record is first opened or edited, whether or not archived records are filtered, as well as remembering module window location and size. The Output List Columns dialog box appears. It will look something like this, with fields appropriate to the current module:



Output List Columns

Field Name	Description
Available Fields	All fields (columns) that are available for the output list screen.
Displayed Fields	The fields that are currently displayed in the output list screen or have been selected from the 'Available Fields' list for display. If a 'sort by' field is not selected, the default output list will sort by the first field listed in 'Displayed Fields'.
Add>>	Select a field from the 'Available Fields' list box and click **Add**. The field appears above the currently selected field in the 'Displayed Fields' list box.

<<Remove	Select a field to be removed from the 'Displayed Fields' list box and click **Remove**.
Reset	Click to reset the 'Displayed Fields' to its original settings.
Move Up	To move a field up one in the order of the 'Displayed Fields', select the field and click **Move Up**. The top field in the list is the left most column in the output list screen and the bottom field is the right most column.
Move Down	To move a field down one in the order of the 'Displayed Fields' list box, select the field and click **Move Down**. The top field in the list is the left most column in the output list screen, and the bottom field is the right most column.
Column Width	Indicates the pixel width of the selected field. Highlight the field in the "Displayed Fields" column and then edit the Column Width for that field. Once you select the OK button (after making any other changes in the Output List Column dialog), this will be the default width for the field as it appears in the output list screen.
Header	To change the header text for a column, select the column name in the 'Displayed Fields' list box and modify the contents of the **Header** text box.
Show Tab When Module Opens	When opening a record, the selected tab will be displayed.
Enterprise Wide	The 'Enterprise Wide' option appears only in the Personnel module. Choose the state for the Enterprise Wide option. 1. False - Select the check box one time so that it is no longer in its inactive state. If the Enterprise Wide field is set to false, and if filters are turned on in System Customization Personnel Data Group Filters, the query will search only the filtered records. 2. True - Select the check box two times and a check mark will appear. Select this option if you want to search on records in the entire Personnel module, regardless of the data group filtering.
Sort by	When the output list displays, the list will be sorted by the selected column in this list box. If a 'sort by' field is not selected, the default output list will sort by the first field listed in 'Displayed Fields'.

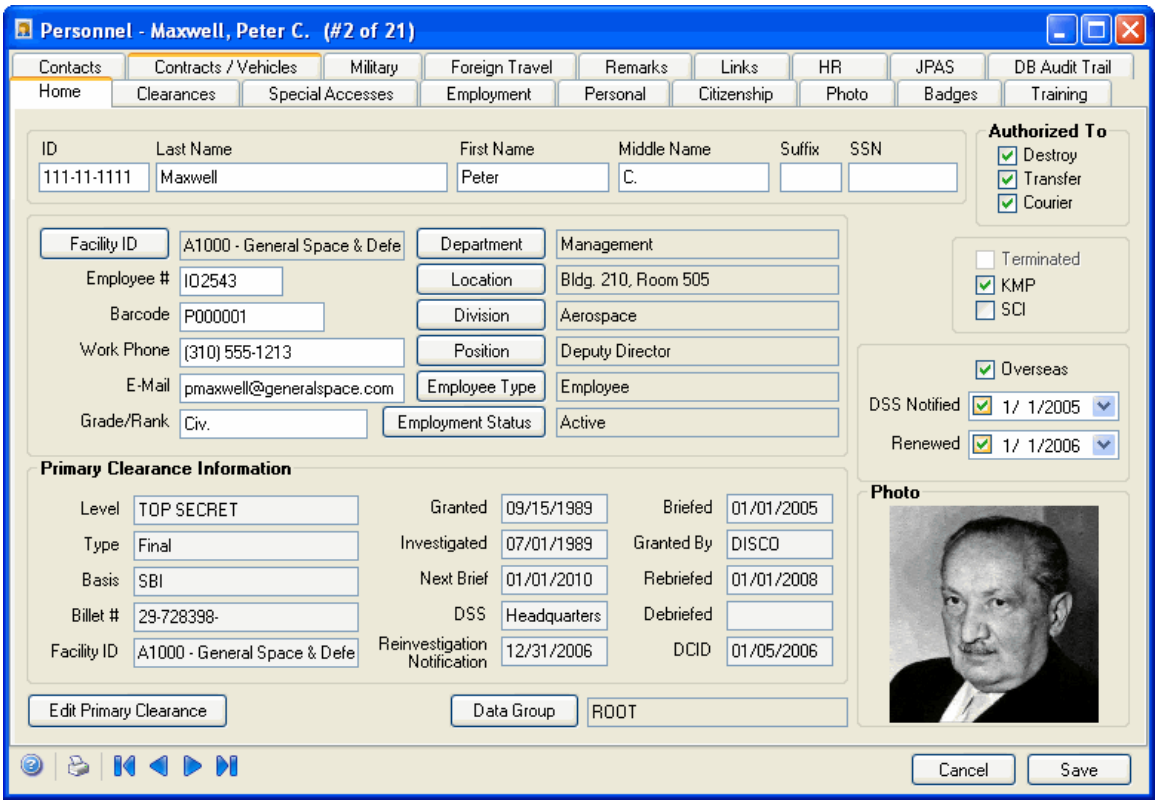
Sort Order	The default 'sort by' column in the output list screen can be sorted ascending or descending.
Filter Inactive	If checked, inactive records will be filtered when entering the output list screen.
Remember Module Window Location	If checked, the output list screen will open using the same location before it was previously closed.
Remember Window Size	The module's output list screen can be re-sized or maximized. If this option is checked, the output list screen will open using the output list screen's window size before it was previously closed.
Cancel	Click to close the dialog box and not save changes.
OK	Click to accept your changes and close the dialog box.

Related Topic

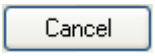
Output List Screen

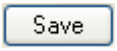
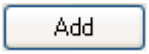
Input Screen

The Input Screen displays one record at a time and lets you add or modify fields. The Personnel input screen is shown below as an example.



Input screen buttons

Button	Description
	Open link to help documentation and video files.
	Print all information for the selected record.
	Display first record in the selection (as shown in the output list).
	Display previous record in the selection (as shown in the output list).
	Display next record in the selection (as shown in the output list).
	Display last record in the selection (as shown in the output list).
	Exit the record, discard any changes, and return to the output list screen.

	Save changes to the record. Upon choosing to save a record, validations are checked against settings that are selected in the System Customization dialog. Required fields specified in Utilities -> Data Fields Defaults are also checked. Validation errors and required fields must be fixed before a record can be saved.
	Create a new record.
	Modify an existing record.
	Remove an existing record.

Notes for Data Entry
You can enter data into most fields, one at a time, using any of the characters from the keyboard. There are some fields that require only an integer value. An alert message will appear if an incorrect character type is entered.

Related Topics

Pick Lists and Pickers

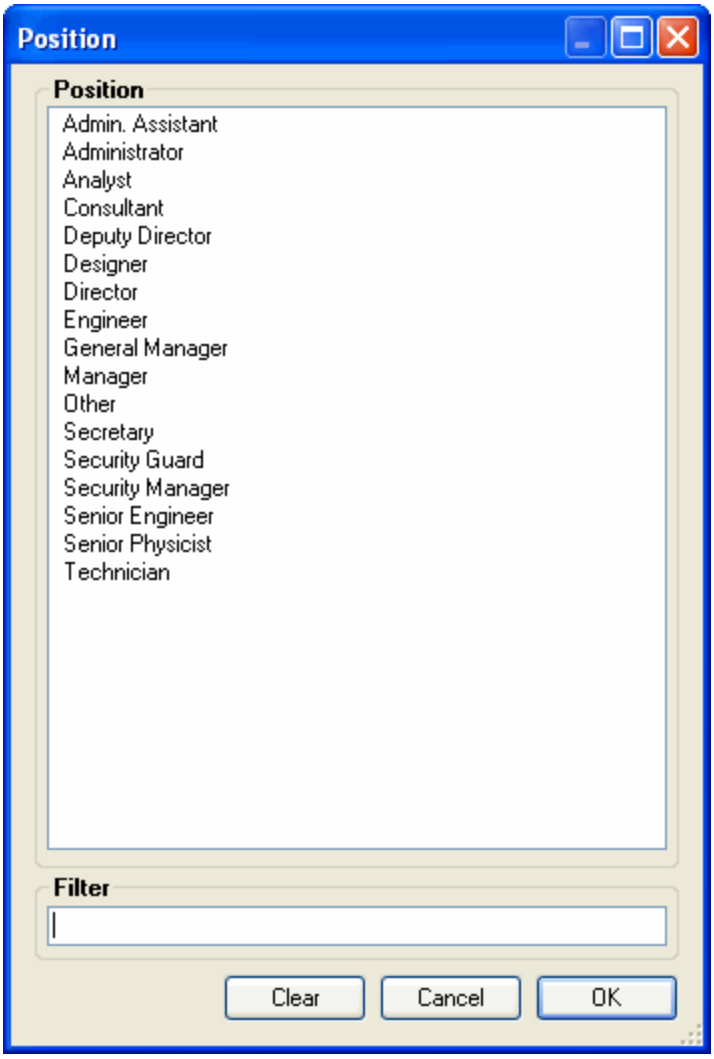
Data Field Defaults

Pick Lists and Pickers

Pick Lists

SIMS has a number of standard choice pop-up fields that have been set up for pick lists, which are efficient ways of creating and storing repeating values for some fields.

Take as an example the Position field in the Cleared Personnel module. When selecting the button for this field, it enables you to pick a value from a list.



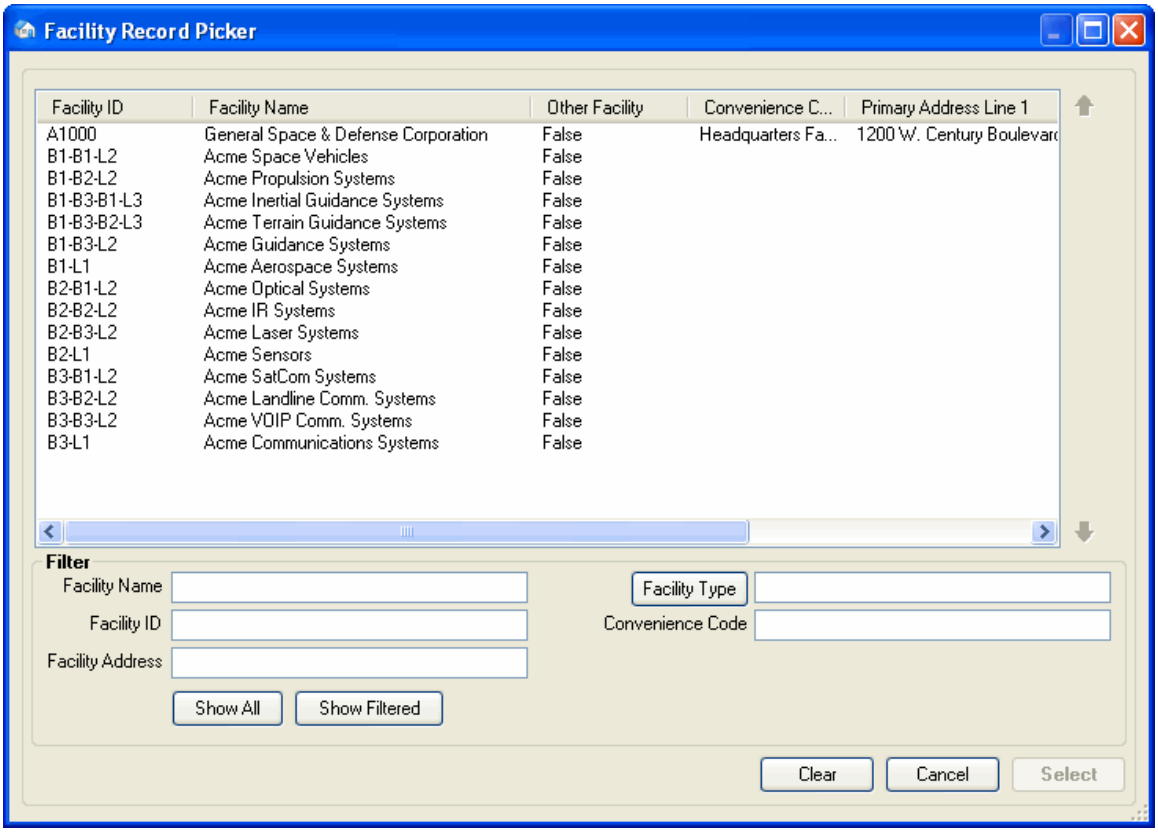
The List Management utility lets you manage the pick list values. Values can be displayed for all users or only for a selected data group. In the List Management utility, a SIMS Manager has access to add/edit/delete list items for a pick list. A Submanager has access only to add/edit/delete items within their Data Group.

Field Name	Description
Filter	Enter a name to be searched for. If searching for a name that starts with a certain string of text, enter that string and then follow that entry with the "%" wildcard character. A string that both starts and ends with the % character wildcard is a "contains" type of search.
Clear	Select to clear the field's value.
Cancel	Select to exit the pick list

Pickers

A limitation of the pick list scheme occurs when needing to select from a large number of items, or when the list contents are changing dynamically. One example of this situation is when you need to select a facility to send an outgoing visit request to. The Other Facilities module may contain hundreds or even thousands of records from which to select, so a means for filtering and selecting the desired records is required. In this situation, SIMS employs 'pickers'.

As an example the Facility Record Picker is shown below. You can use Facility Picker throughout SIMS, wherever you can select a facility. This dialog box enables you to search for a facility by Name or ID. If Data Groups are being used and data group filtering is turned on in the System Customization Data Group filtering tab for the Other Facilities module, only Other Facilities that belong to the user's data group will display when displaying the picker dialog for Other Facilities.



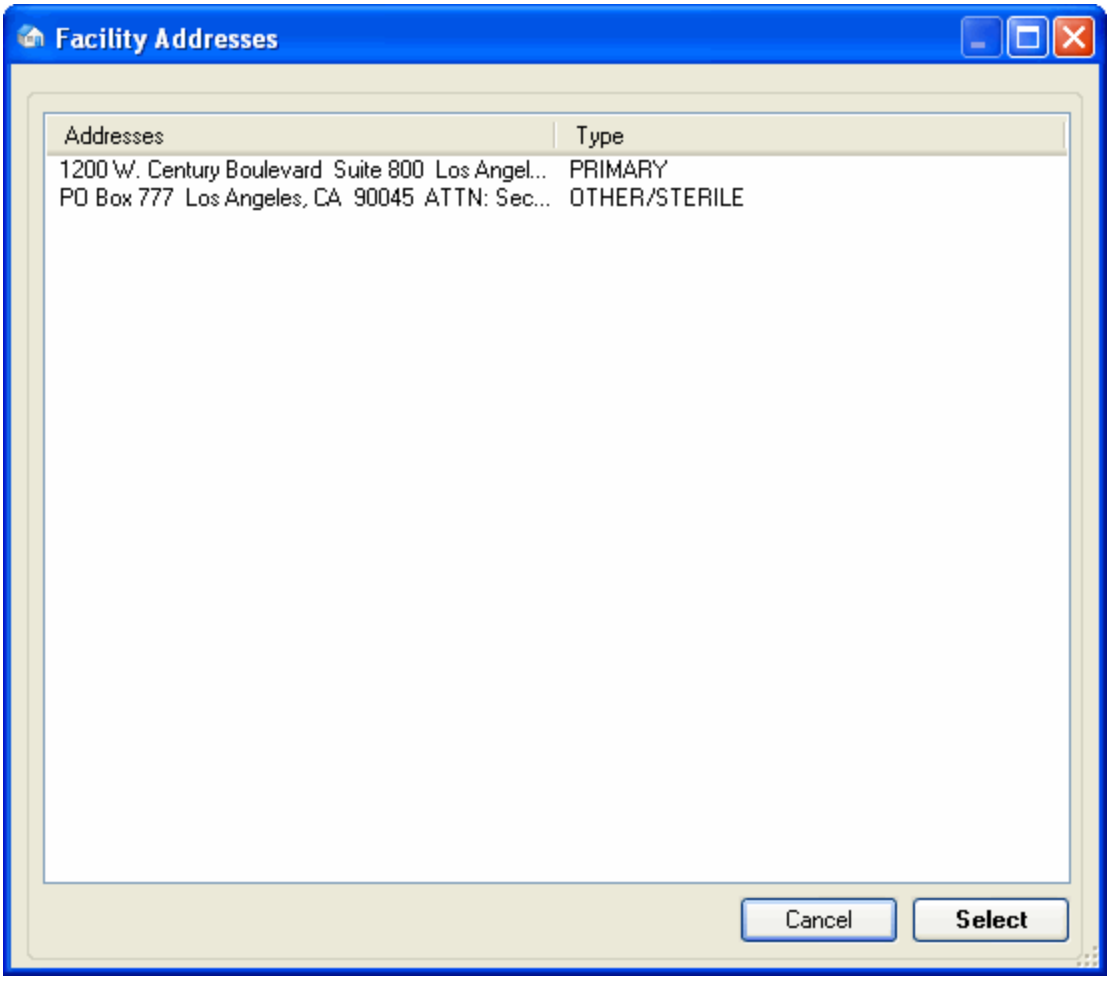
Picker Screen Fields

Field Name	Description
Find Name	Enter a name to be searched for. If searching for a name that starts with a certain string of text, enter that string and then follow that entry with the "%" wildcard character. A string that both starts and ends with the % character wildcard is a "contains" type of search.

Find ID	Enter an identification number to be searched for. If searching for a number that starts with a certain string of numbers, enter that string and then follow that entry with the "%" wildcard character. A string that both starts and ends with the % character wildcard is a "contains" type of search.
Show All	Select to redisplay all records.
Show Filtered	Select to begin search and find only those records that meet the Find Name and/or Find ID, Facility Address, Facility Type, and/or Convenience Code parameters.
Select	Select desired record from the list box and click **Select**. To select a specific address (e.g., for a To Facility Visit Request), select the facility. A second screen will appear listing the available addresses. See the screen below. Select the address and choose **Select**.
Clear	Select to clear the record list and filters.
Cancel	Select to exit the record picker.

To Sort

The Facility list automatically sorts by facility ID. Click on any column header to sort by that column instead. Clicking on the column header a second time reverses the sort order.
The address list automatically sorts by address type.



Related Topics

Input Screen

List Management

Data Groups

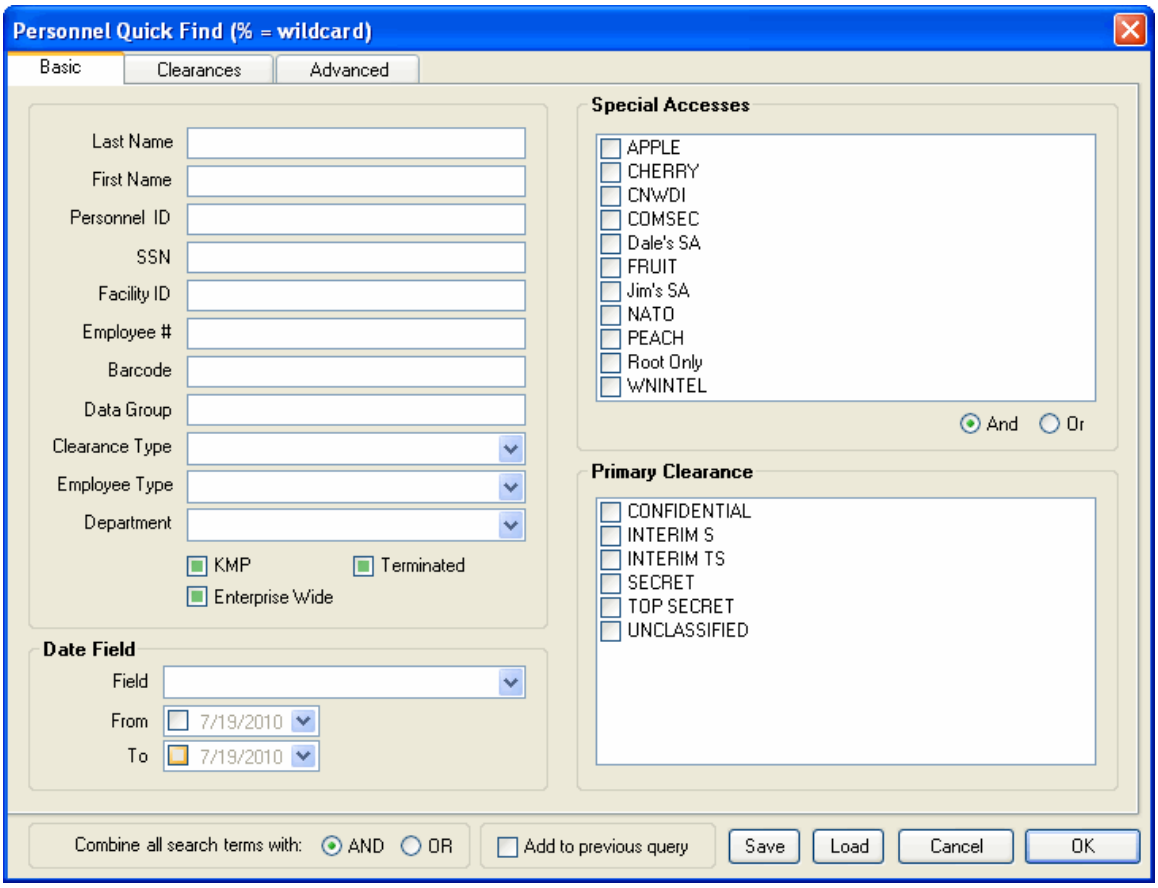
Finding Records Using Quick Find

Quick Find is designed to allow simple but rapid searches.

Click **Quick Find**  , or press Ctrl-F.
A Quick Find screen like the Personnel Quick Find screen shown below opens.

Basic Quick Find

To use the Basic Quick Find feature, simply enter the criteria to be used for the search into the appropriate field(s) and click **OK**. If you enter data into more than one field, it is "anded," meaning that the records to be found must exhibit all of the specified criteria. You can use the '%' character as a wild card.



Personnel Quick Find Screen

For example, to find all personnel with a SECRET security clearance:

1. Select **SECRET** in the list.
2. Click **OK**.

Personnel with a SECRET level security clearance appear on the screen.
To find all personnel whose last name begins with MAX:

1. In the **Last Name** field, enter MAX%.
2. Click **OK**.

Personnel whose last names begin with MAX appear on the screen.

Field Name	Description
And/Or	Select the type of operation.
Add to previous query	Check this option if you want to filter based on the previous query in the Output List.
Save	Use this button to save the Quick Find settings. The information will be saved as a .xml file.
Load	Use this button to open the .xml file that was saved earlier.

Three state check boxes

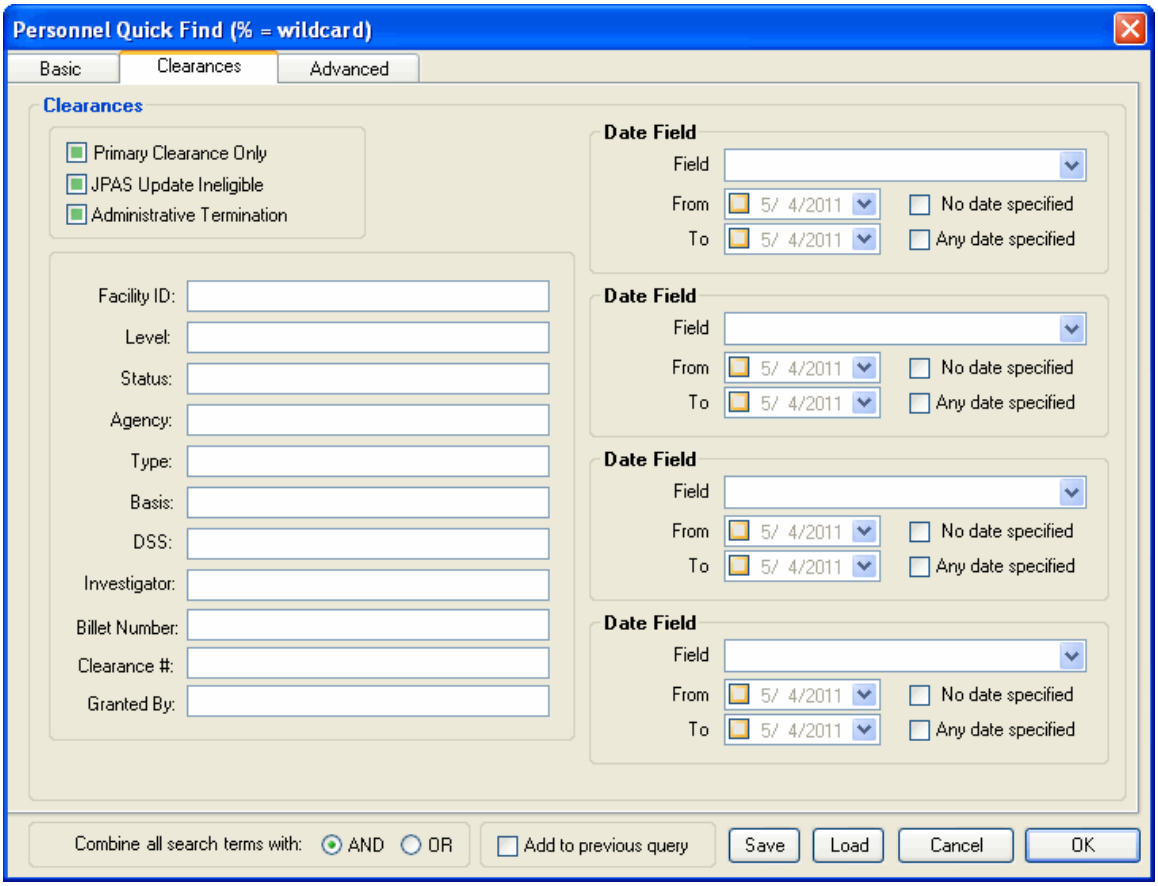
In many of the Quick Find dialogs, there will be a field that uses a check box. The **Archived** field is one example in which a 3 state check box is used.

The following is a description of the 3 states:

1. Inactive - By default when the Quick Find dialog is displayed, the check box is inactive. The field will not be used to complete the search.

2. False - The check box can be used so that the field is false. Select the check box one time so that it is no longer in its inactive state.
For example, if the **Archived** field is set to false, the search will look for all records that are not marked as archived. All active records will be displayed.

3. True - If checked, the field will be set to a true state. Select the check box two times and a check mark will appear.
For example, if the **Archived** field is set to true, the search will look for all records that are marked as archived.



Advanced Quick Find

The Advanced Quick Find can be used to create quick queries on all sub table records and pick list values.
For example, a search on all personnel who belong to a particular division can be created by using the "is equal to" operation.

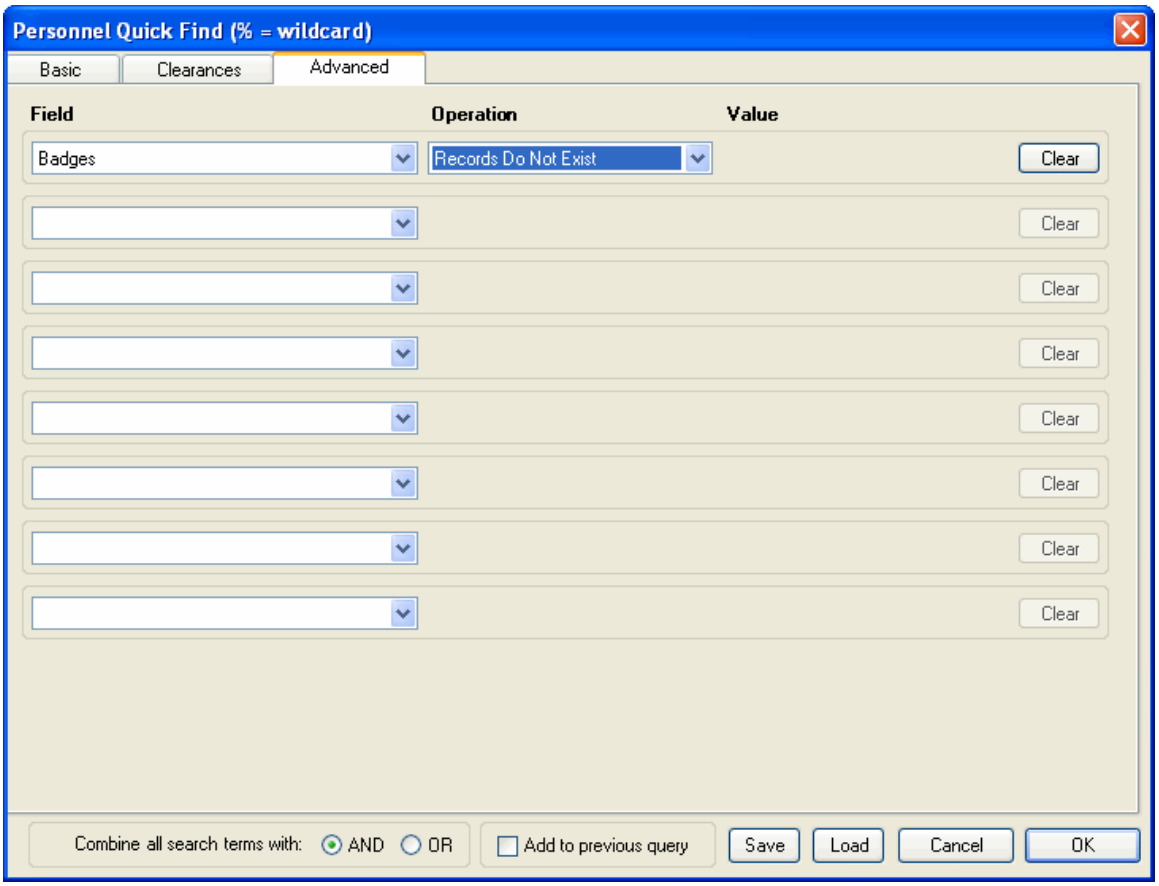
1. Select **Division** from the list.

2. Select "i**s equal to**" as the operation.
3. Enter a division name.
4. Click **OK** to complete the search.

The Advanced Quick Find can also allow a search on all records that exist or do not exist. For instance, a search can be done on all personnel who do not have a badge.

1. Select **Badges** from the list.
2. Select "**Records Do Not Exist**".
3. Click **OK**. The Output List Screen will display all personnel who do not have any badges.

If you enter data into more than one field, it is "anded," meaning that the records to be found must exhibit all of the specified criteria. You can use the '%' as a wild character.

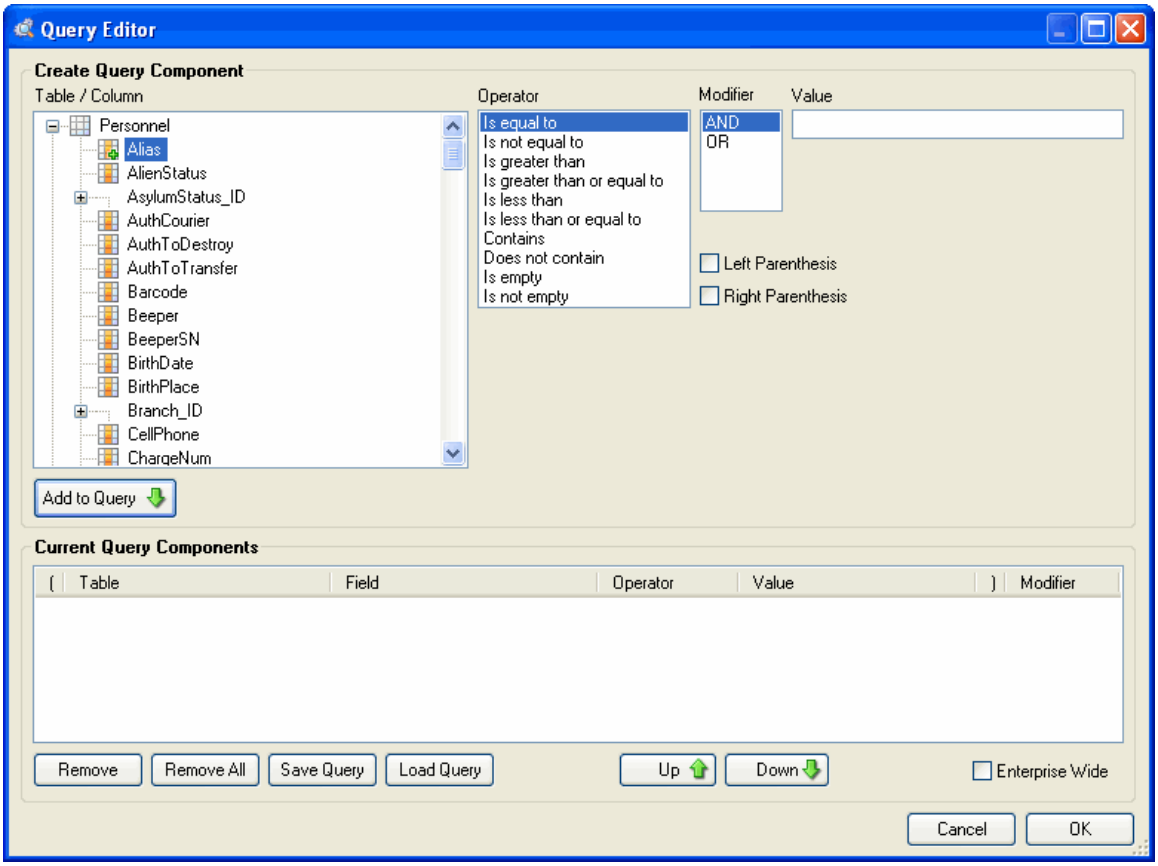


Field Name	Description
Field	Select the field.
Operation	Select the type of operation.
Value	If the operator requires a value, enter it here.
Clear	Choose this button to clear the quick find statement.

Finding Records Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:

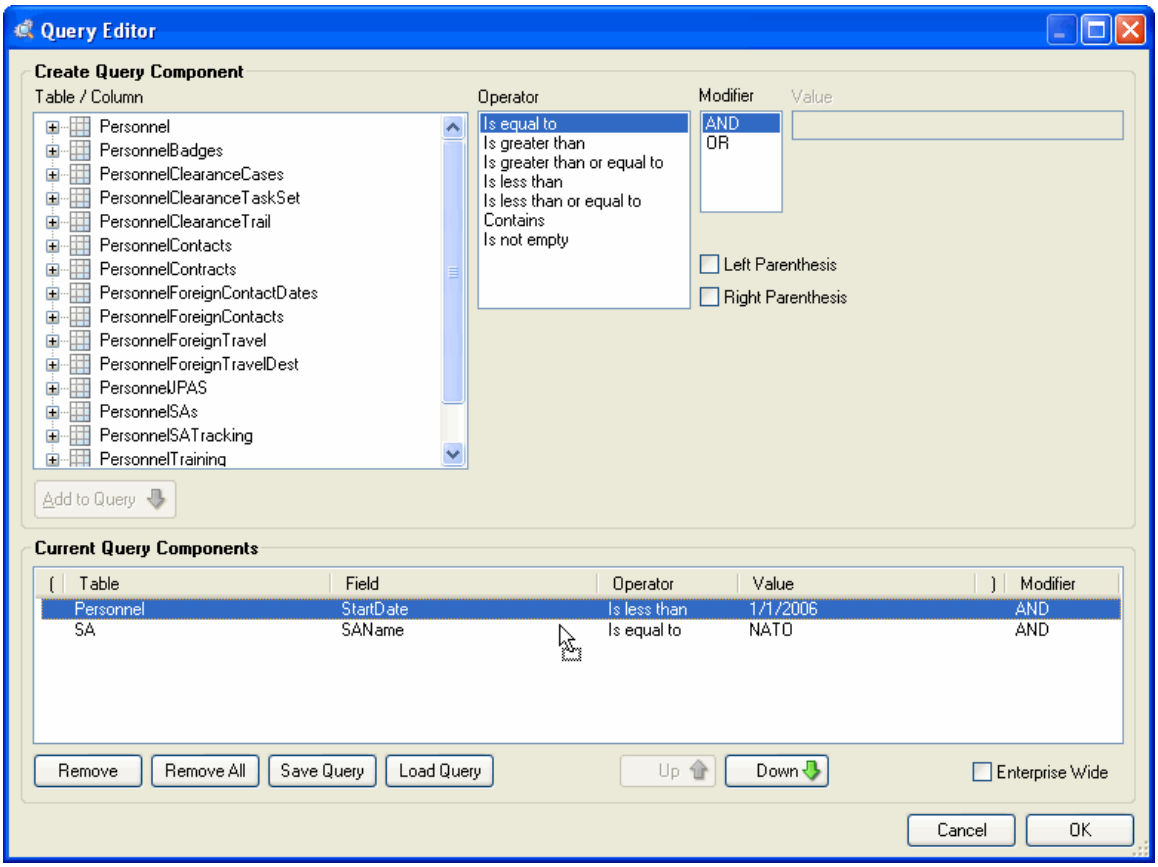


Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type. When a field is selected, the 'Add to Query' button will be enabled. If it the button is not enabled, expand the node to select one of the field names under the node.
Operator	The value definition.

Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.
Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
Enterprise Wide	The 'Enterprise Wide' option appears only in the Personnel module. If Personnel filters are turned on in System Customization Data Group Filters, the query will search only the filtered records. Select this option if you want to query on the entire Personnel module instead.
OK	Click to start the search.
Cancel	Click to close the screen.

Once the query has been created, you can drag/drop one or more rows to re-arrange the query.



QUERY CONVENIENCE TIP:
For queries that take time to set up, SIMS allows you to save these as "templates" that can be loaded later and used again without having to be recreated.
To save a query, click on the Save Query... button at the bottom of the screen and save the file to a convenient location. To use the saved query criteria later, click on the Load Query... button, find the query file and open it.

Reports

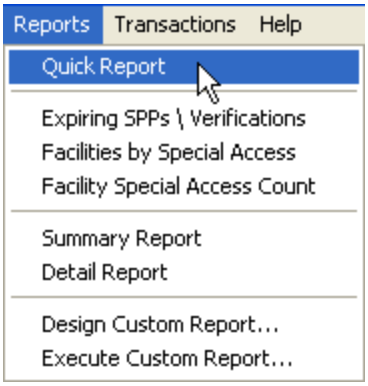
There are several ways to generate reports throughout the SIMS program.

Standard reports

There are four standard types of report in SIMS.NET. Individual modules may also have reports that are customized to their needs. To see the reports that are available to you, open the **Reports** menu.

Reports Menu

From the main screen in any module, open the **Reports** menu. Some modules may have additional reports besides those that appear here.



Standard Reports Menu

Quick Report

Select **Quick Report** to open the Quick Report Editor. Quick Report is a powerful tool that enables you to create your own customized column-based reports and labels. The Quick Report Editor is the same for every module.

Summary Report

To print a summary listing of selected records, select the record(s) using the check boxes or by highlighting records in the output list screen. Quick Find or the Query Editor can be used to search for records. Click on a column header to sort the results. If all the records from the search are to be reported on, do not highlight or select a record. Then select **Summary Report** from the **Reports** menu.

Detail Report

To print a detail report, select the record(s) using the check boxes or by highlighting records in the output list screen. Quick Find or the Query Editor can be used to search for records. Click on a column header to sort results. If all the records from the search are to be reported on, do not highlight or select a record. Then select **Detail Report** from the **Reports** menu. Print from the detail report screen.

Design Custom Report

Select **Design Custom Report** to open the SIMS Report Engine. The SIMS Report Engine is a full-featured report writer you can use to create custom reports. It includes custom layouts and scripting to create powerful reports similar to the predefined reports included in SIMS. Some programming experience is recommended.

Execute Custom Report

Select **Execute Custom Report** to run an existing report (.rpx) file.

Related Topics

Custom Reports

Task Scheduler

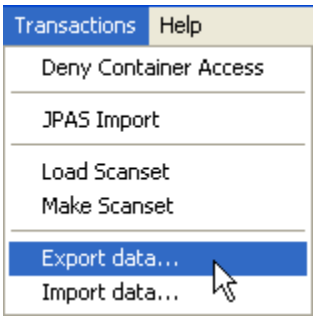
Export and Import Transactions

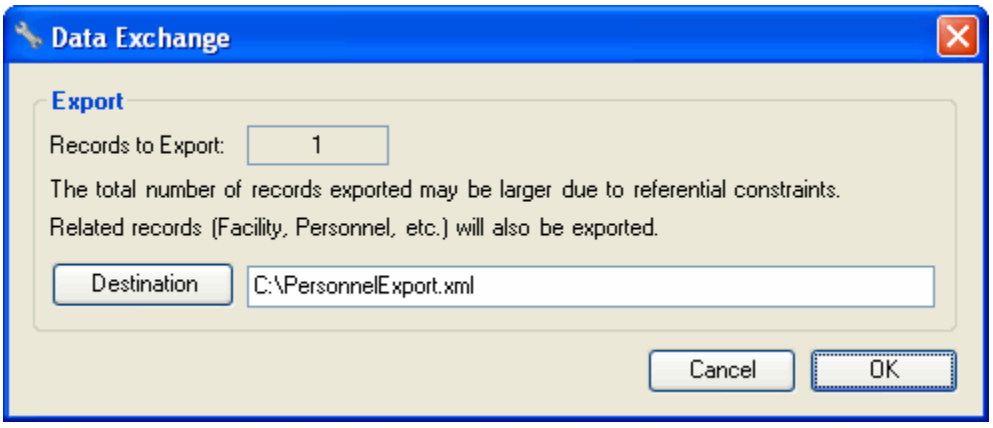
The Export and Import Data transactions allow you to export and import SIMS records. This is useful when moving records to a different instance of SIMS without having to overwrite an existing database.

Export Transaction

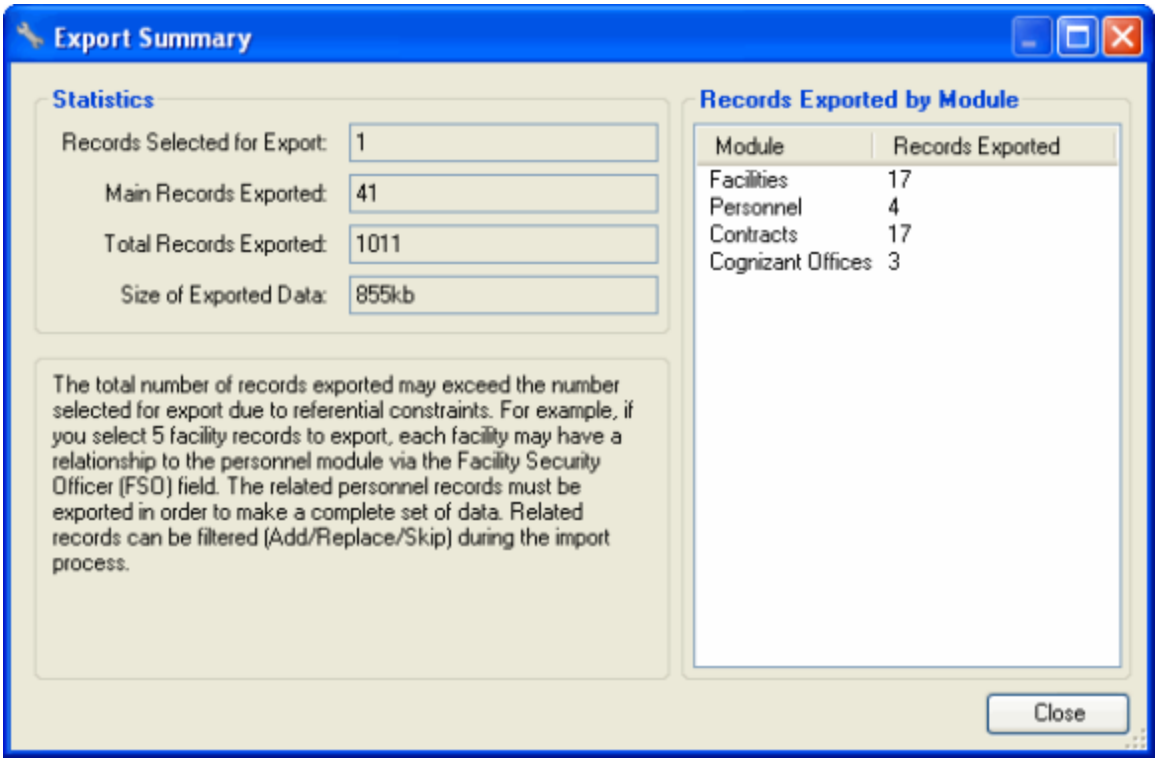
The Export transaction allows you to export a group of records in a SIMS module. When exporting a record, all related records will also be exported. Before choosing the Export transaction, determine if all or only certain Personnel records (i.e. only records of a specified Data Group) should be exported. Click on a column header to sort results. Select the record(s) using the check boxes or by highlighting records in the output list screen. If all the records from the search are to be reported on, do not highlight or select a record.

Quick Find or Query Editor can also be used to search on Personnel records.





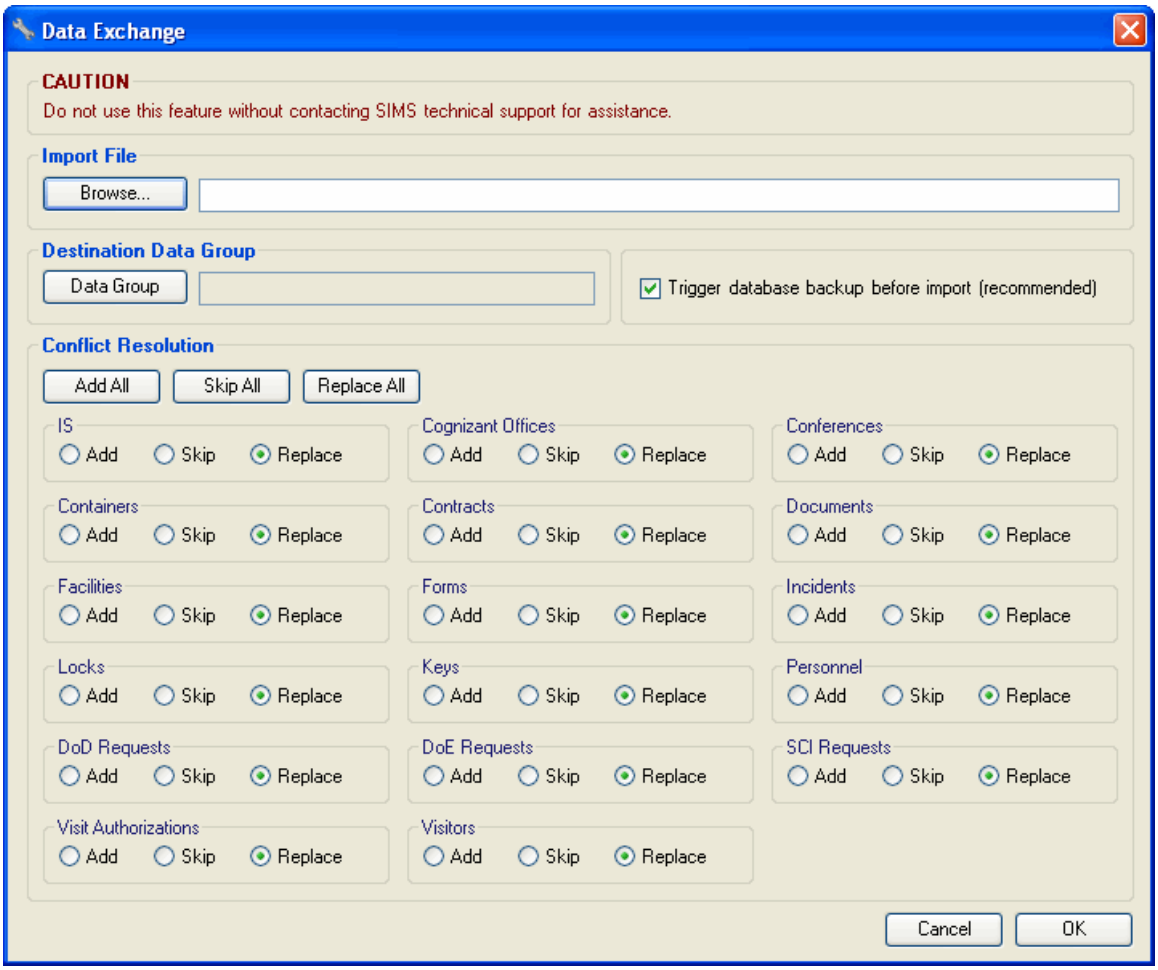
Choose Transactions - > Export Data and then specify a destination for the export. All related records will be exported and that data will be stored in a .xml file.


Export Summary
Statistics
Records Selected for Export: 1
Main Records Exported: 41
Total Records Exported: 1011
Size of Exported Data: 855kb
The total number of records exported may exceed the number selected for export due to referential constraints. For example, if you select 5 facility records to export, each facility may have a relationship to the personnel module via the Facility Security Officer (FSO) field. The related personnel records must be exported in order to make a complete set of data. Related records can be filtered (Add/Replace/Skip) during the import process.
Records Exported by Module
Module
Records Exported
Facilities 17
Personnel 4
Contracts 17
Cognizant Offices 3
Close

An Export Summary dialog will provide statistics about the records that were exported. The .xml file can be used to import records into a SIMS database.

Import Transaction

Once an export transaction file has been created, the .xml file can be used for an Import transaction.



Choose Transactions - > Import Data and browse for the export .xml file. Choose whether or not a database backup will be triggered and select from a list of conflict resolutions. After choosing the OK button, the import will proceed and a Data Exchange log report will display the results of the import.

Data Entry Hierarchy

Fields in some modules rely on records existing in other modules for validation.

There is a data entry hierarchy that should be followed, unless modified within the SIMS validations, via the SIMS System Customization utility. In order to enter any data into a particular module, it may be necessary to enter records in an associated module first. This is due to the fact that SIMS must perform auditing and cross-checking with other modules, while new records are being added, to ensure that correct types of data are entered, and to avoid discrepancies.

For example, if a document is entered, SIMS checks that the custodian entered for that document is in the Cleared Personnel module, that the custodian is cleared to the level of the document (including any special accesses), and that the custodian has access to the safe where the document is to be located. In order to do this, the custodian must have already been added to the Cleared Personnel module and the safe the document is stored in must be in the Containers module. Another example would be adding an employee to the Cleared Personnel module. In this case, SIMS checks whether the clearance of the employee exceeds the clearance of the facility. This requires data about the facility to have been already added to the Host Facilities module.

You can customize the validations by selectively turning on/off the validation check boxes in the System

Customization utility.
For SIMS to perform the necessary checking between modules, enter data the order shown below:

1. Host Facilities (requires only 3 below)
2. Other Facilities (requires only 3 below)
3. Cognizant Offices (example DSS entries are pre-stored)
4. Cleared Personnel (requires only 1 above)
5. Containers (requires 1 & 4 above)
6. Classified Contracts (requires 1 & 4 above)
7. Classified Documents (requires 1, 4, 5 & 6 above)
8. Outgoing DoD, DoE & SCI Visit Requests (requires 1, 2, & 4 above & optionally 6 above for DoD Requests)
9. Visitors & Visit Authorizations (requires 1, 2 & 4 above)
10. Information Systems (IS) (requires 1 & 4 above)
11. Incidents. (requires 1, 2 & 4 above)
12. Conferences. (requires 1, 2, 4, and 9 above)
13. Lock & Keys (requires (1, 2, & 4 above)

Creating Unique Fields

Creating a Unique Index

There are very few fields in SIMS that are required to be unique, without exception. Examples include the Barcode field for documents, AIS systems and hardware records, which must be unique for each facility to which they are assigned. As part of the SIMS customization process, certain additional field uniqueness may be desirable. Examples include the Personnel ID, Employee Number and SSN fields, as well as the Facility ID (typically Cage Code) fields.

To make a field unique in SIMS v7, use a SQL statement in Query Analyzer similar to the following FacilityID example:

```
CREATE UNIQUE NONCLUSTERED INDEX IX_FacilityID ON Facility (FacilityID)
```

If you want it to be unique by Data Group use:

```
CREATE UNIQUE NONCLUSTERED INDEX IX_FacilityID ON Facility (FacilityID,
UserGroup_ID)
```

Note that the index name, IX_FacilityID must (1) start with IX_, and (2) end with the field name you want displayed to the user. For example, IX_FacilityName would tell the user they entered a duplicate value in 'FacilityName'.

Before executing the scripts to create a unique field, any duplicate values should be fixed first. The following two scripts can help identify duplicate SSN's and Personnel ID's. After executing the script, go back into SIMS and use Quick Find to query on the PersonnelID in the Personnel module's output list screen. Once the SIMS record is found, the value will need to fixed manually so that it is unique.

```
-- Find Duplicate Personnel SSN's.
USE SimsXml
GO
SELECT PersonnelID, LastName, FirstName, SSN
FROM Personnel
WHERE SSN IN(SELECT SSN FROM [Personnel] GROUP BY SSN HAVING COUNT(SSN) >
1)
```

This script will find records that have duplicate Personnel ID's.

```
-- Find Duplicate Personnel PersonnelID's.
USE SimsXml
GO
SELECT PersonnelID, LastName, FirstName, SSN
FROM Personnel
WHERE PersonnelID IN(SELECT PersonnelID FROM [Personnel] GROUP BY
PersonnelID HAVING COUNT(PersonnelID) > 1)
```

After any duplicate SSN and Personnel ID's are fixed, the following two scripts can be executed. These 2 scripts will create unique values for a non-encrypted SSN field as well as the Personnel ID. A custom script will need to executed if the SSN field has been encrypted. Please contact SIMS technical support for assistance on this type of script.

```
-- Create a Unique Index on the Personnel SSN field by executing the
following SQL script...
USE SimsXml
GO
CREATE UNIQUE NONCLUSTERED INDEX IX_SSN ON Personnel (SSN)
```

```
-- Create a Unique Index for the PersonnelID field by executing the
following SQL script...
USE SimsXml
GO
CREATE UNIQUE NONCLUSTERED INDEX IX_PersonnelID ON Personnel (PersonnelID)
```

Please **BACKUP** your SIMS database before running any scripts.

To execute any of the SQL scripts above...
1) Go to Start / Programs / Microsoft SQL Server 2005 / SQL Server Management Studio.
2) In the connection dialog make sure Server Name is SERVER\INSTANCE (example .\SIMS).

3) Click Connect.
4) Select the New Query button.
5) Copy and Paste each specific script into the Query screen.
6) Click Query/Execute or Press F5.
7) Repeat steps 4-6 for each specific script.

Saving Unique Indexes between SIMS Versions

When upgrading SIMS versions, the procedure takes the existing database structure and makes it look like a new SIMS database structure. Any custom structural modifications will be lost. The above index scripts will need to be re-executed after performing an upgrade to a version of SIMS earlier than 7.3.41.

In SIMS versions 7.3.41 or newer, there is a way to save the unique indexes so that the scripts will not need to be re-executed. There is a ExampleExcludeList.xml file that is installed in the SIMS Database folder. The default path for this folder is C:\Program Files\SIMS Software\Database. In SIMS Standalone, this file path would be on your local machine. For Multi-User SIMS, the file path would be on the server. Once the names of the objects are added to the .xml file, the objects will be preserved when upgrading SIMS to the next version. Below is an example.

If you have this index:

```
-- Create a Unique Index for the PersonnelID field by executing the
following SQL script...

USE SimsXml
GO
CREATE UNIQUE NONCLUSTERED INDEX IX_PersonnelID ON Personnel (PersonnelID)
```

The ExampleExcludeList.xml file would be modified as shown in the example below. Note that the SQL script is not added to the ExampleExcludeList.xml. The SQL script is executed first using SQL Server Management Studio. The .xml file only holds the names of the objects (tables, indices, stored procedures, triggers, etc.).


Once the file is modified, the .xml file needs to be renamed to ExcludeList.xml.

```
<!-- NOTE: Database objects created by altering a table (e.g., primary key
constraint, default constraint, etc.) or on a table (e.g., index or
trigger) will be excluded if the table is excluded. -->
<Object name="IX_PersonnelID "/>
```

Using Custom Database Objects

When upgrading SIMS versions, the procedure takes the existing database structure and makes it look like a new SIMS database structure. Any custom structural modifications will be lost. Any custom objects (tables, indices, stored procedures, triggers, etc.) that were added to the database would need to be re-added when upgrading to a version of SIMS earlier than 7.3.41.

In SIMS versions 7.3.41 or newer, there is a way to save custom objects so that they will not be lost between upgrades. There is a ExampleExcludeList.xml file that is installed in the SIMS Database folder. The default path for this folder is C:\Program Files\SIMS Software\Database. In SIMS Standalone, this file path would be on your local

machine. For Multi-User SIMS, the file path would be on the server.

The ExampleExcludeList.xml is only an example. Once the file is modified, the .xml file needs to be renamed to ExcludeList.xml. When upgrading SIMS, the installer will ignore any custom objects that are referenced in this file.

```
<?xml version="1.0" encoding="utf-8" ?>
- <ExcludeList>
    <!--  This file contains the names of custom items added by the user
            that should be ignored when upgrading a database when installing SIMS.   -->
    <!--  EXCLUDING OBJECTS   -->
    <!--  This section provides an example for each SQL type that can be excluded
            from the upgrade process.   -->
    <!--  NOTE: Database objects created by altering a table (e.g., primary key
            constraint, default constraint, etc.) or on a table (e.g., index or trigger)
            will be excluded if the table is excluded.   -->
    <Object name="TableName" />
    <Object name="ViewName" />
    <Object name="StoredProcedureName" />
    <Object name="DatatypeName" />
    <Object name="DefaultName" />
    <Object name="UserDefinedFunctionName" />
    <Object name="RuleName" />
    <Object name="DatabaseTriggerName" />
    <Object name="FullTextCatalogName" />
    <!--  EXCLUDING OBJECTS IN OTHER SCHEMAS   -->
    <!--  Example: Given a schema named 'TestSchema' with a table named 'TestSchemaTableName',
            use just the object name without the schema name:    -->
    <Object name="TestSchemaTableName" />
    <!--  Other database objects (e.g., views, procedures, etc. as listed above) in the schema
            can be excluded in a similar manner.   -->
    <!--  The following lines will NOT work!   -->
    <Object name="TestSchema.TestSchemaTableName" />
    <Object name="[TestSchema].[TestSchemaTableName]" />
  </ExcludeList>
```

Database Backup and Restore

Backing up your SIMS database

If you want to perform a manual backup of your SIMS database, use the following:

Backup instructions:
1) Go to Start / Program / Microsoft SQL Server 2005 / SQL Server Management Studio.
2) In the connection dialog make sure **Server Name** is SERVER\INSTANCE (example .\SIMS) and click* Connect*.
3) Expand your server under the Object Explorer pane.
4) Expand **Databases / SimsXml**.
5) Right click on **SimsXml** and select **Tasks / Backup**.
6) Set Backup Type to **Full**.
7) Under Destination, click **Add**... and specify the backup destination.
8) Click **OK**

Note:
While the method above provides a quick way to backup your data, we strongly recommend you use this in conjunction with standard backup software that is scheduled for regular intervals. If something happens to your PC, you'll have to reinstall the operating system, reinstall SIMS, then restore your data from a backup.

A relatively inexpensive and easy to use program is Paragon Software's Drive Backup 10:
http://www.paragon-software.com/business/db-workstation/

Another option is Symantec's Norton Ghost 15:
http://www.symantec.com/norton/ghost

These programs will backup the entire disk, operating system, programs, and data.

Restoring your SIMS database

If you want to perform a manual restore of your SIMS database, use the following:

Database Restore instructions:
1) Go to Start / Program / Microsoft SQL Server 2005 / SQL Server Management Studio.
2) In the connection dialog make sure **Server Name** is SERVER\INSTANCE (example .\SIMS) and click **Connect**.
3) Expand your server under the Object Explorer pane.
4) Expand **Databases / SimsXml**.
5) Right click on **SimsXml** and select **Tasks / Restore / Database**.
6) Set **'To database: SimsXml'**.
7) Set **'From database: SimsXml'**.
8) Select the Backup sets to restore.
9) Click OK
10) Verify you receive a message "The restore of database 'SimsXml' completed successfully."

Training & Technical Support

Although SIMS comes with a tutorial that is coupled with a training workbook and numerous training videos for self-paced training, if you determine that you need formal training in order to effectively use SIMS to manage your security information, please contact us and we will schedule a training session at your facility, for a reasonable fee.

If you are using SIMS and encounter a situation that seems cumbersome or you otherwise need assistance in getting SIMS to do what you want, please contact our technical support staff.

Email
techsupport@simssoftware.com
Phone
858-481-9292
Hours
Monday - Friday, 7:00 am - 5:00 pm, Pacific Time

Periodically, updates are made available to SIMS users that have subscribed to our upgrade subscription service. You can download those SIMS updates from the Downloads area of our web site at http://web.simssoftware.com/.

Host Facilities

Purpose of Host Facilities

The Host Facilities module maintains information about the facility using SIMS.

The Host Facilities module stores data regarding all of the host user's cleared facilities. Company name, facility ID, address, phone, clearance level, and point of contact are some of the items that comprise the host facilities data. This information is useful when communicating with other facilities with respect to security matters. Use the Host Facilities module for things such as checking the date of last SPP update or generating mailing lists.

The Host Facilities module is separate from the Other Facilities module, to simplify the handling of the host versus other-facilities information in other modules and in reports.

The following modules use information in the Host Facilities module:

- Cleared Personnel
- DoD Outgoing Requests
- DoE Outgoing Requests
- SCI Outgoing Requests
- Containers
- Classified Contracts
- Classified Documents
- Visitors
- Visit Authorizations
- Automated Information Systems (AIS)
- Incidents

Input Screen Description
Home
Other Addresses
Cog Office
Cog Inspections
Internal Inspections
Access Control
Key Security Personnel
Contracts
Points of Contact
Awards
Remarks
Links

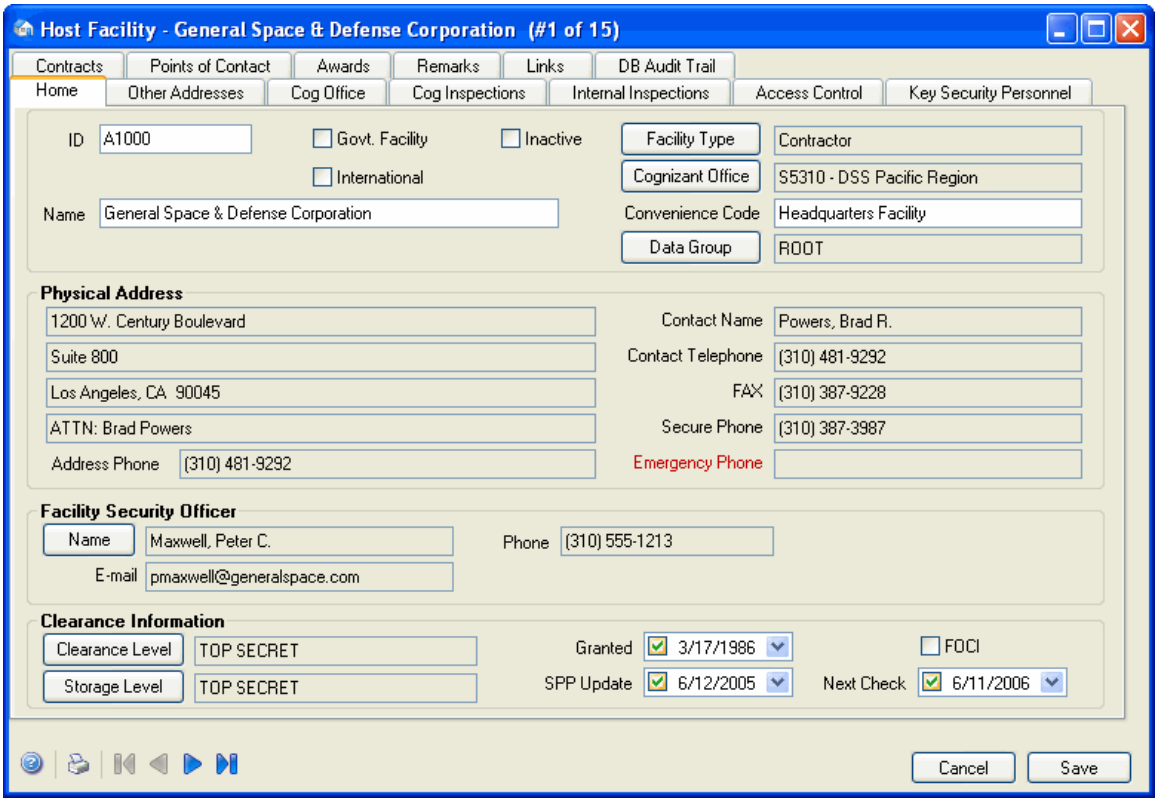
List Screen Description
Default Output List

Reports
Reports

Facility Record Picker
Facility Record Picker

Host Facilities Input

Host Facilities Home



For more information about using this screen, see Input Screen.

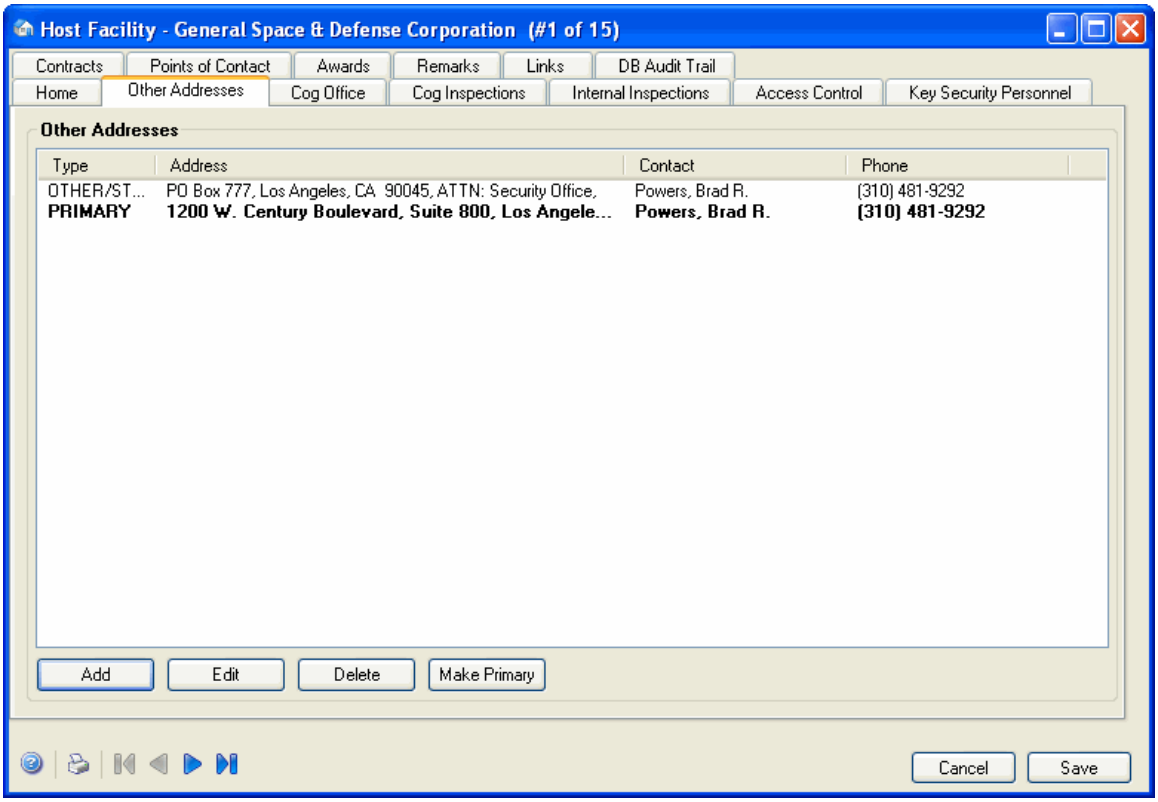
Host Facilities, Home Page Fields

Field Name	Description
ID	The ID is typically the Contractor and Government Entity code (CAGE code). If a facility does not have an actual CAGE code (e.g., some government facilities), then enter a unique alphanumeric identifier into the ID field.
Inactive	Select if the facility is no longer active.
Govt. Facility	Select if this is a government facility.
Name	Enter the name of the facility.
International	Select if this is an international facility.
Type	Select the type of facility. The options come from the user-defined list in Utilities List Management.
Cognizant Office	Click to select the facility's cognizant security office. Government facilities typically do not have cognizant agencies.

Convenience Code	Enter an acronym, "tri-graph," or abbreviation that identifies the facility.
Data Group	The data group that the facility belongs to. Data groups are defined in the User Management Data Groups dialog.
Physical * *Address	The address of the facility. Note that on the Home tab, this information is read-only. To enter information, click the Other Addresses tab and enter primary address information.
Address Phone	The phone number of the facility. Note that on the Home tab, this information is read-only. To enter information, click the Other Addresses tab and enter primary address information.
Contact Name	The name of the Point of Contact (PoC). Note that on the Home tab, this information is read-only. To enter information, click the Other Addresses tab and enter primary address information.
Contact Telephone	The PoC's telephone number. Note that on the Home tab, this information is read-only. To enter information, click the Other Addresses tab and enter primary address information.
FAX	The primary facsimile telephone number of the facility. Note that on the Home tab, this information is read-only. To enter information, click the Other Addresses tab and enter primary address information.
Secure Phone	The telephone number of any secure telephone in the facility. Note that on the Home tab, this information is read-only. To enter information, click the Other Addresses tab and enter primary address information.
Emergency Phone	The emergency telephone number of the facility. Note that on the Home tab, this information is read-only. To enter information, click the Other Addresses tab and enter primary address information.
Facility Security Officer - Name	Click to select the facility's security officer (FSO) from the Cleared Personnel module.
FSO Phone	The FSO's telephone number, as obtained from the Cleared Personnel module.

FSO e-mail	The FSO's e-mail address, as obtained from the Cleared Personnel module.
Clearance Level	Select the maximum security clearance level of the facility.
Storage Level	Select the maximum storage level of the facility.
Granted	The date that the facility's security clearance was granted.
SPP Update	The date of the last update to the SPP (Standard Practices and Procedures).
FOCI	Indicates if the facility is under foreign ownership, control, or influence.
Next Check	The date that the SPP (Standard Practices and Procedures) is to be updated.

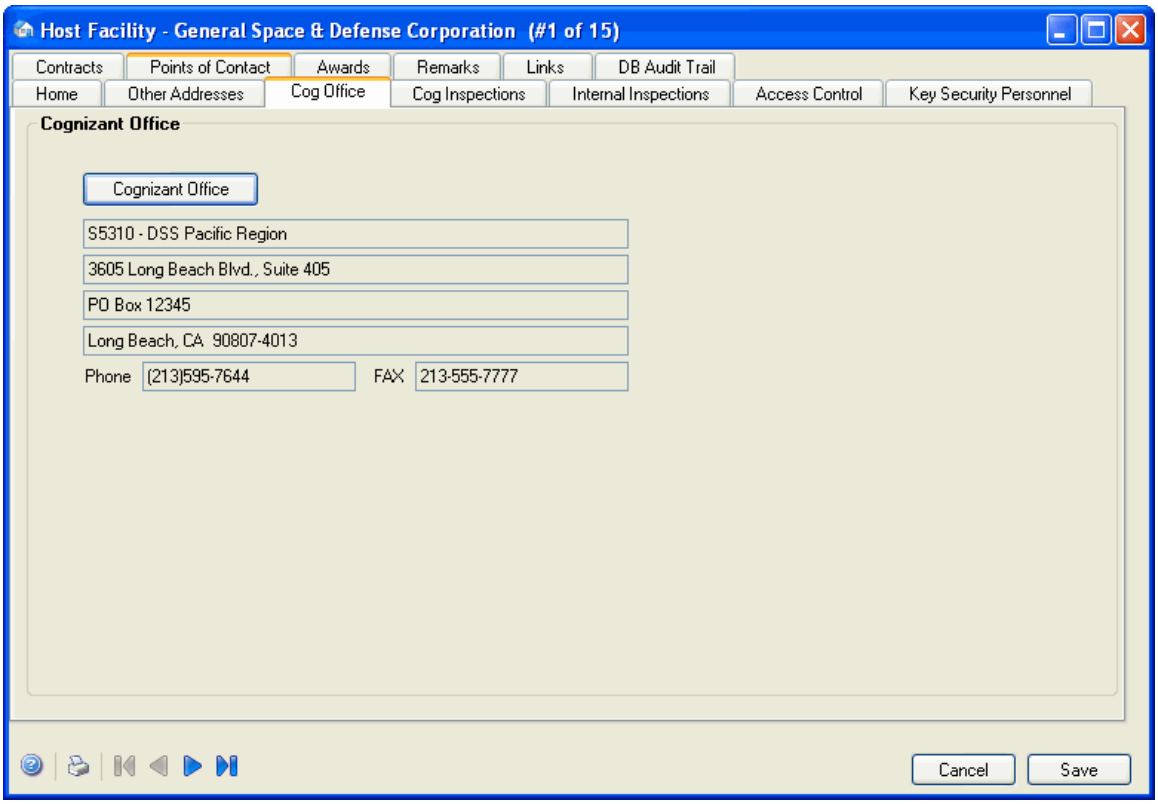
Host Facilities Other Addresses



For more information about using this screen, see Input screen.
Host Facilities, Other Addresses Input Page Fields

Field Name	Description
Type	A way to identify any other address (for example, PRIMARY, OTHER, SHIPPING, etc.). The Address Types are defined in Utilities > List Management. The primary address type is the address displayed in the Home tab of the Facility Input screen.
Address	The full address.
Contact	The name of the Point of Contact (PoC) related to the facility address. When the facility address is selected in a visit request, it will reference this contact information.
Phone	The telephone number for the PoC.

Host Facilities Cog Office



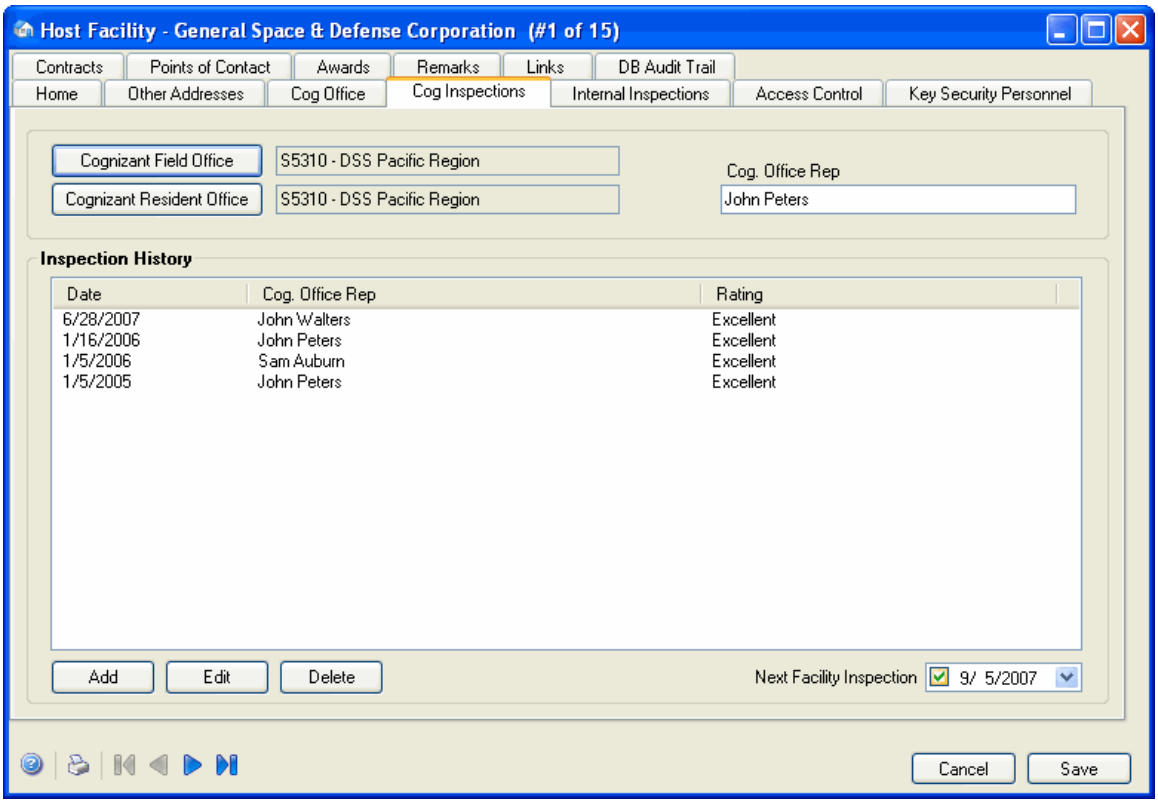
For more information about using this screen, see Input Screen.

Host Facilities, Cog Office Page Fields

Field Name	Description

Cognizant Office	Click to select a cognizant office from the Cognizant Offices module and attach it to this facility.
Phone	The telephone number of the cognizant office, as obtained from the Cognizant Office module.
Fax	The facsimile telephone number of the cognizant office, as obtained from the Cognizant Office module.

Host Facilities Cog Inspections



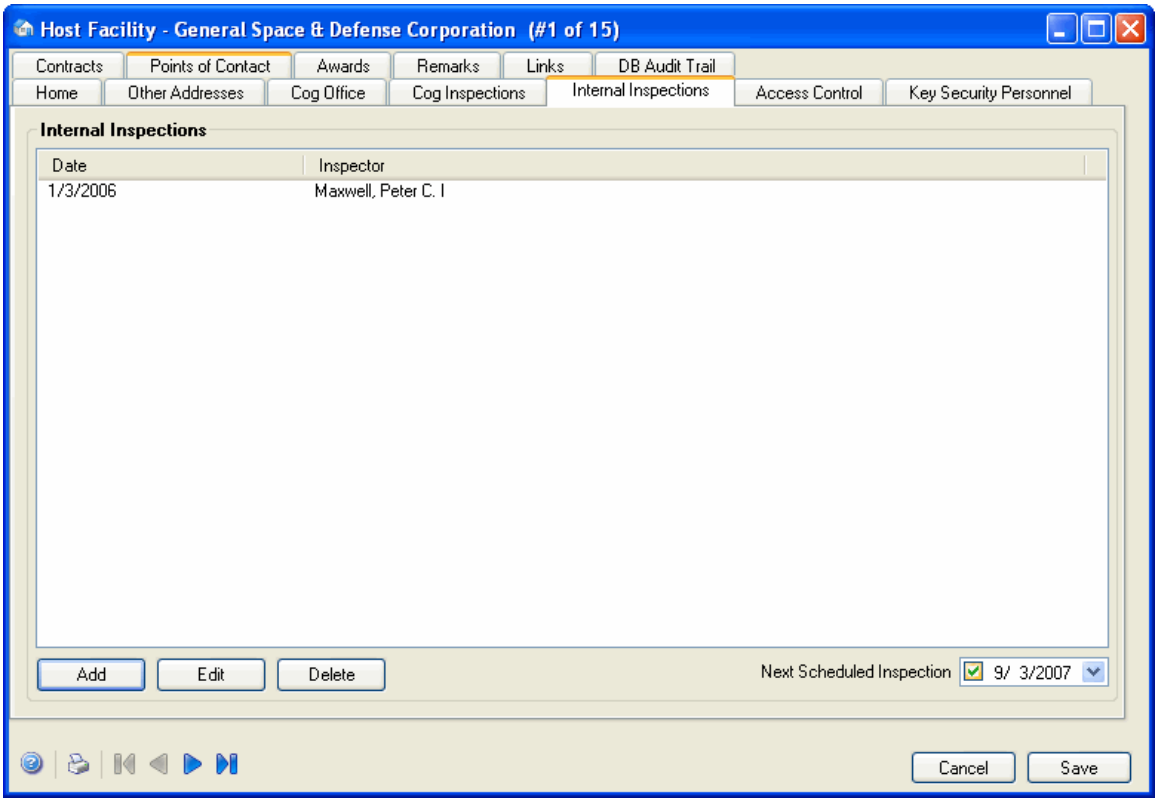
For more information about using this screen, see Input Screen.

Host Facilities, Cog Inspections Page Fields

Field Name	Description
Cognizant Field Office	Click to select a cognizant field office.
Cognizant Resident Office	Click to select the cognizant resident office.
Cog. Office Rep	The name of the cognizant office representative.
Date	The date of the cognizant office inspection.

By	The name of the person who inspected the cognizant office.
Remarks	Any remarks related to the inspection.
Rating	The rating of the cognizant office, based on the most recent inspection.
Add to History	Click this button to add the information to the inspection history.
Inspection History	A history of the inspections performed on the cognizant office.
Next Facility Inspection	The date the facility is scheduled for its next inspection.

Host Facilities Internal Inspections



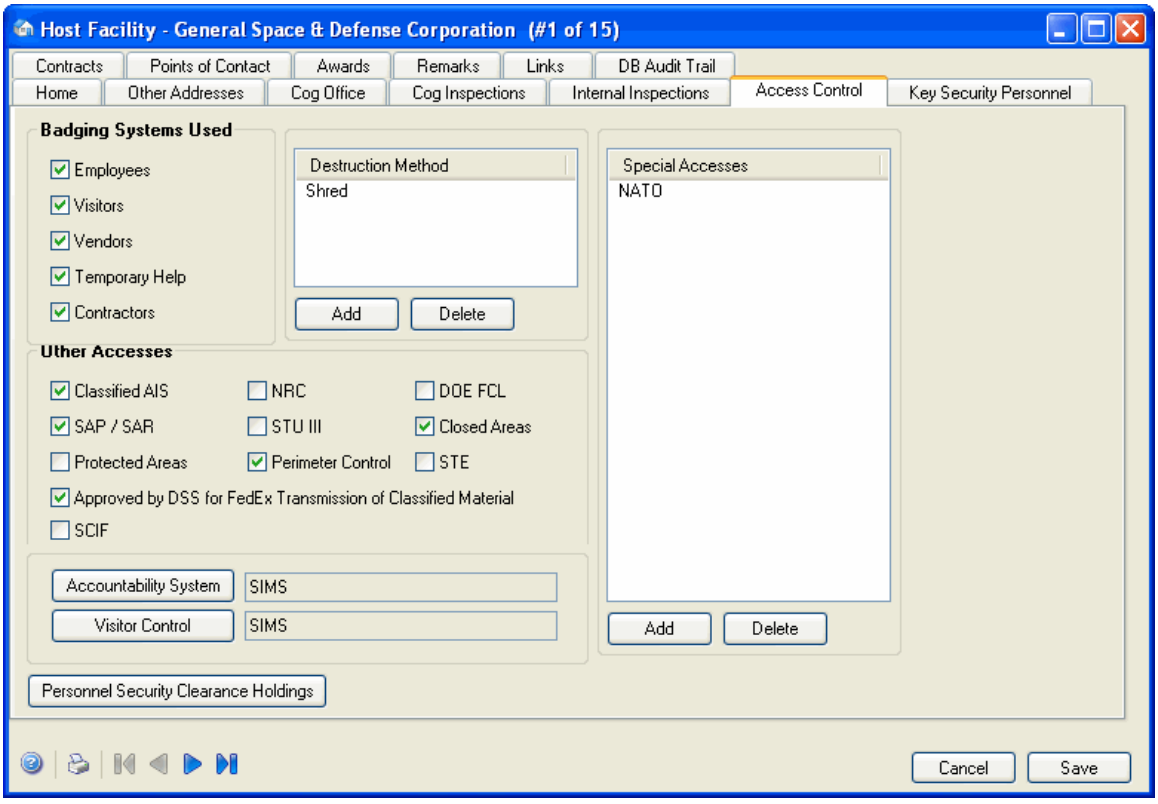
For more information about using this screen, see Input Screen.

Host Facilities, Internal Inspections Page Fields

Field Name	Description

Last Inspected By	Click this button to select the last inspector from the Cleared Personnel module.
Date	The date of the last inspection.
Remarks	Comments from the last inspection.
Next Scheduled Inspection	The date the next inspection is scheduled.
Add to History	Click this button to add the information from the last inspection to history.
Inspection History	Displays a list of previous inspections.

Host Facilities Access Control



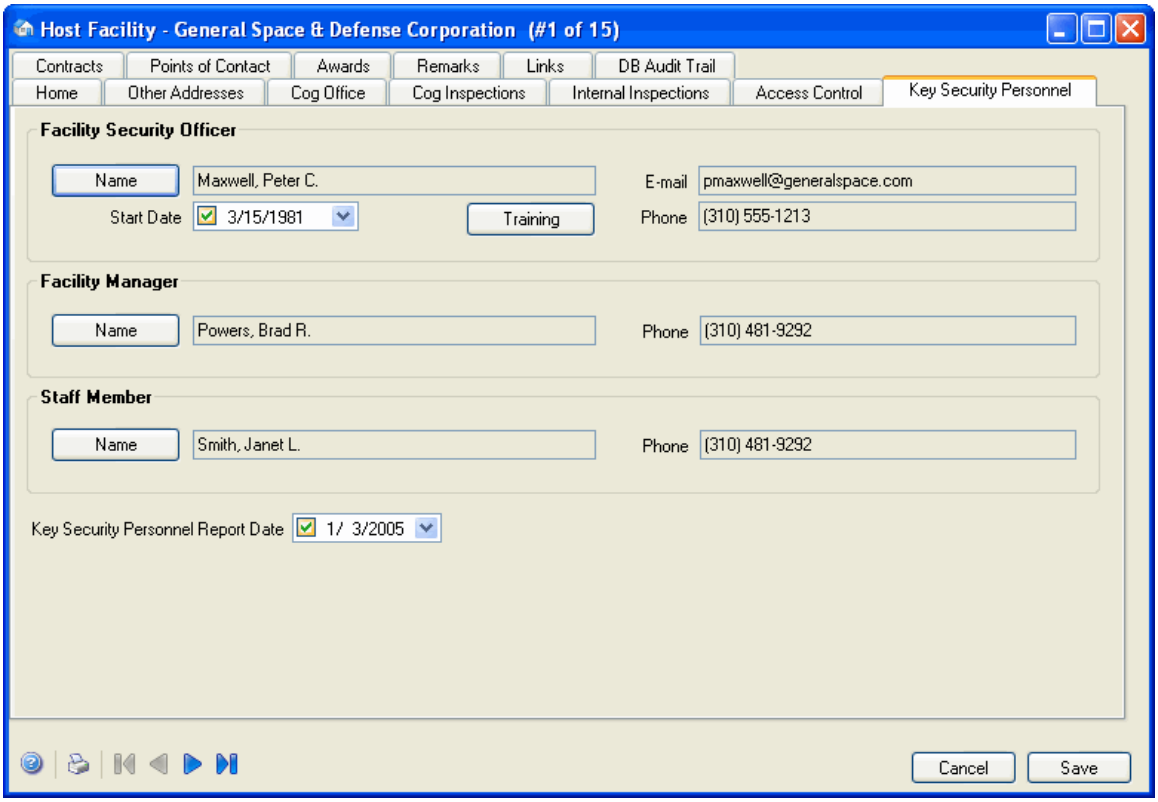
For more information about using this screen, see Input Screen.

Host Facilities, Access Control Page Fields

Field Name	Description
Badging System Used	Select all items that apply to the badging system used for this facility.

Destruction Method	Select the destruction methods used by this facility.
Other Accesses	Select all items that pertain to other accesses for this facility.
Approved by DSS for FedEx Transmission of material?	Select this option if this facility can receive classified material via Federal Express.
Personnel Security Clearance Holdings	Click this button to display a list of the number of clearances held by this facility, subtotaled by each clearance level.
Accountability System	Select the accountability system used by this facility.
Visitor Control	Select the visitor control system used by this facility.
Special Accesses	Add or remove any special accesses held by this facility. Special accesses are defined in Utilities > Special Access Definitions.

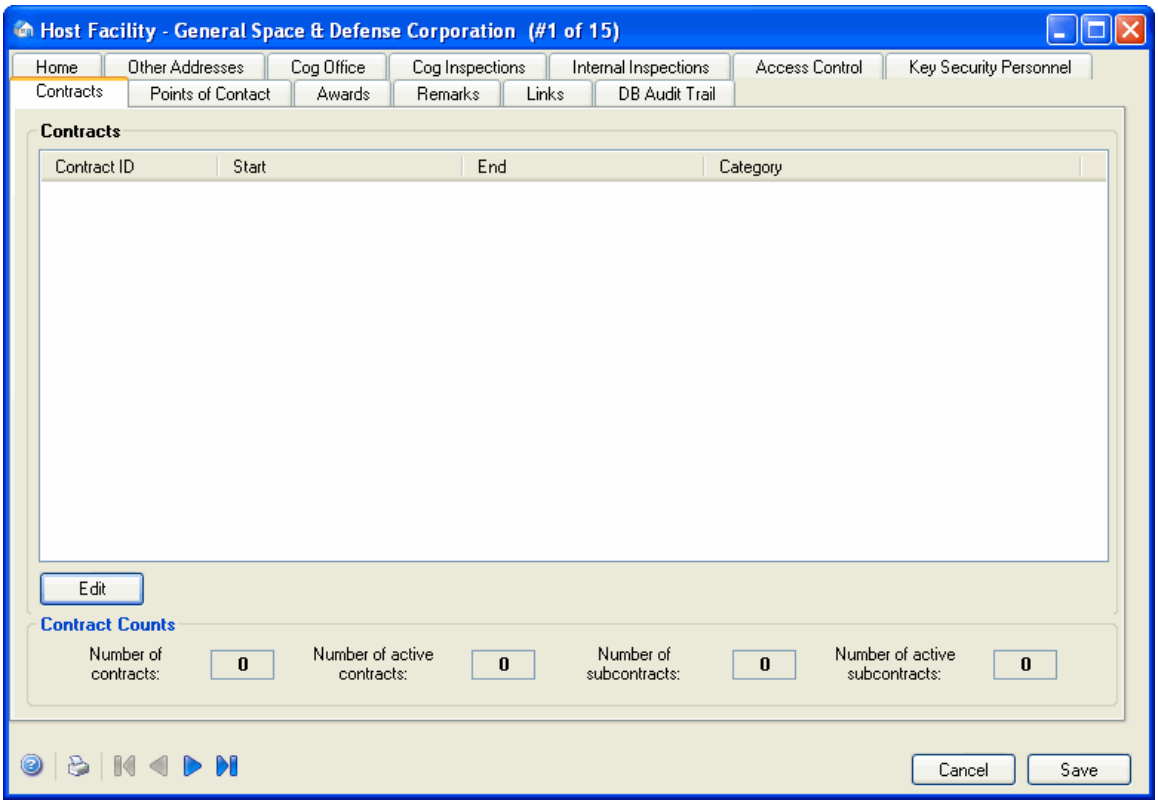
Host Facilities Key Security Personnel



For more information about using this screen, see Input Screen.
Host Facilities, Key Security Personnel Page Fields

Field Name	Description
Facility Security Officer - Name	Click to select the Field Security Officer (FSO) from the Cleared Personnel module.
Start Date	Enter the date the FSO started.
Training	Click to view the courses the FSO has completed. This information is stored in the individual's personnel record.
E-mail	The FSO's e-mail address.
Phone	The FSO's telephone number.
Facility Manager-Name	Click to select the facility security manager from the Cleared Personnel module.
Facility Manager-Phone	The facility manager's telephone number.
Staff Member-Name	Click to select a security staff member from the Cleared Personnel module.
Staff Member-Phone	The staff member's telephone number.
Key Security Personnel Report Date	The date of the last Key Security Personnel report.

Host Facilities Contracts

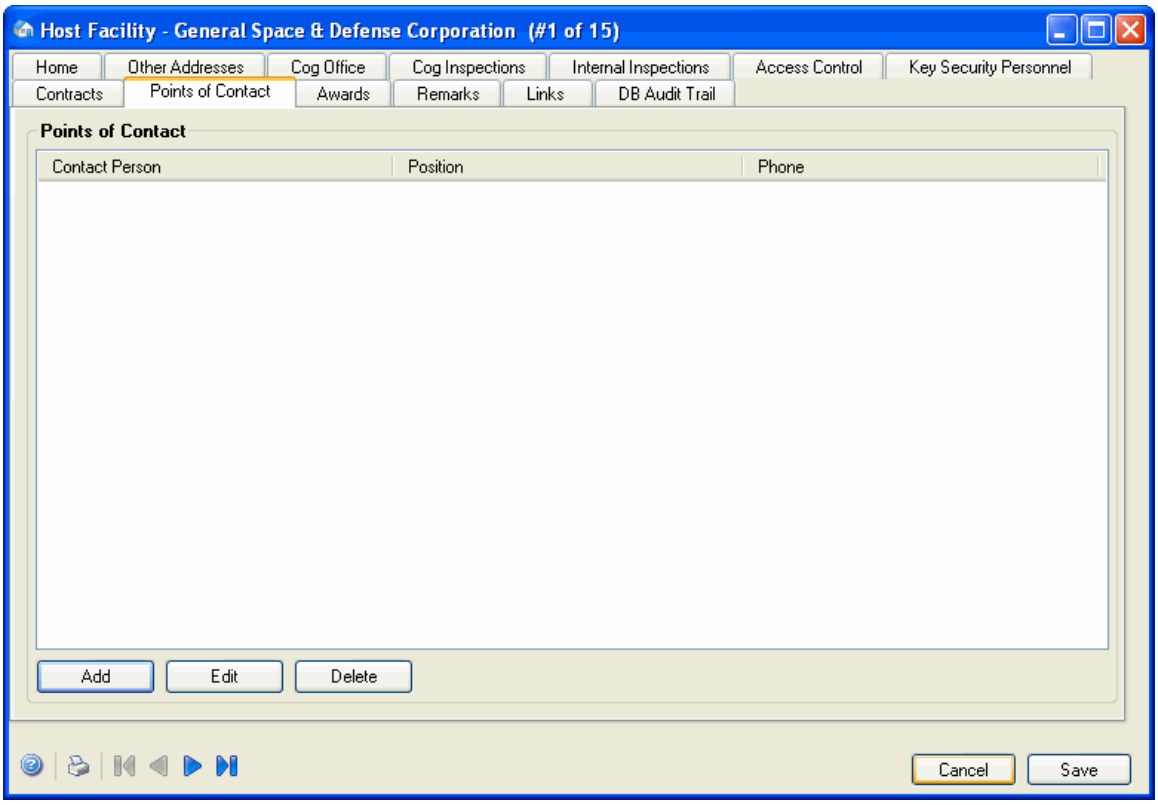


For more information about using this screen, see Input Screen.

Host Facilities, Contracts Page Fields

Field Name	Description
Contract ID	Displays a list of contracts where this facility has been identified as a Performing Facility.
Start	The start date of the contract.
End	The end date of the contract.
Category	The contract category.
Show Contract Counts	Click to display a count of current contracts for this facility.

Host Facilities Points of Contact

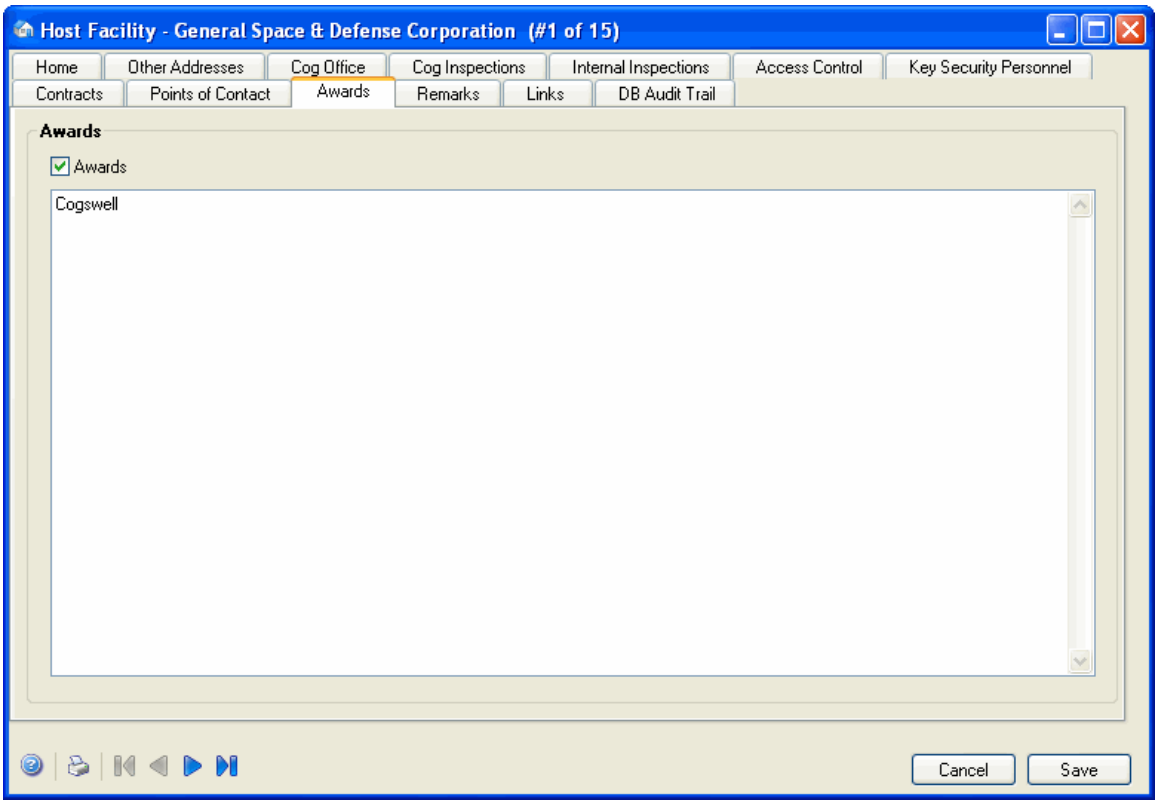


For more information about using this screen, see Input Screen.

Host Facilities, Points of Contact Page Fields

Field Name	Description
Contact Person	The name of the Point of Contact (PoC) associated with this facility. The PoC records are used only in the Host Facility module and do not have a relationship outside of this module. The Facility address tab, however, can specify the contact related to an address. That contact will have a relationship outside of the Host Facility module (i.e. when the host facility address is used in a visit request).
Position	The PoC's position or title.
Phone	The PoC's telephone number.
Notes	Any notes related to the PoC.

Host Facilities Awards

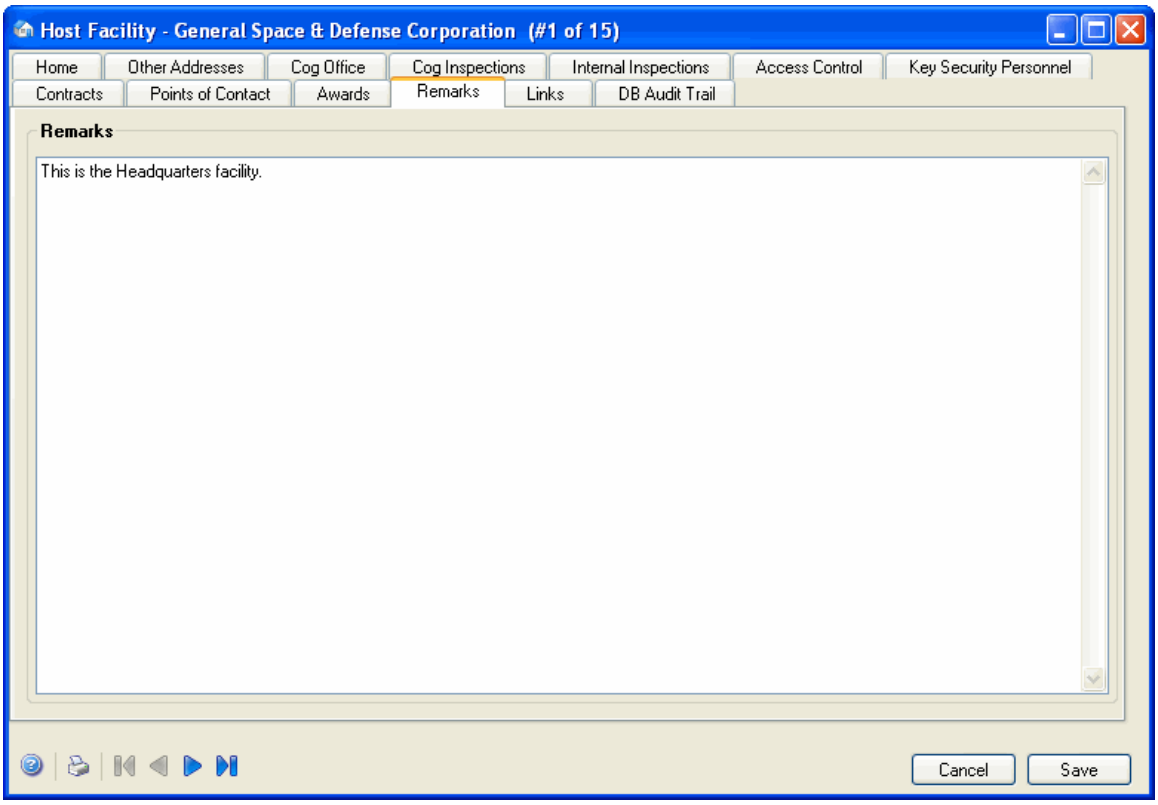


For more information about using this screen, see Input Screen.

Host Facilities, Awards Page Fields

Field Name	Description
Awards	Select if this facility has received awards. Type any remarks in the text box area.

Host Facilities Remarks

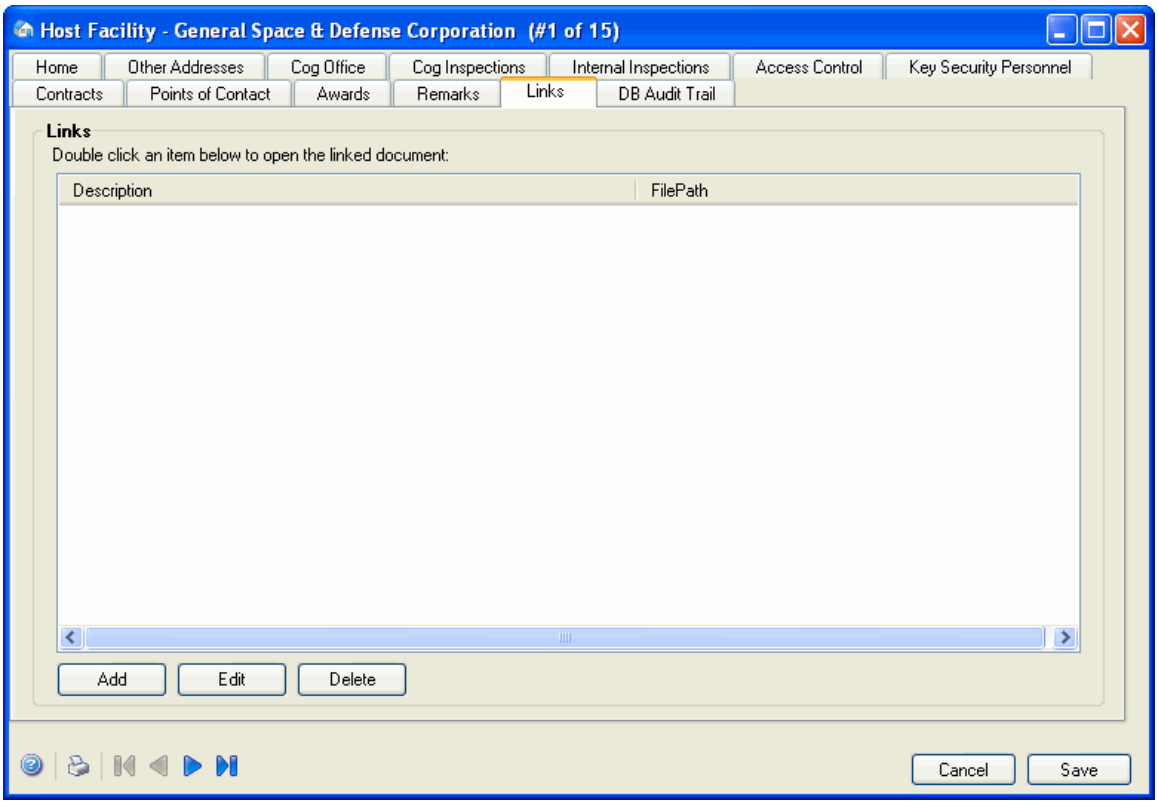


For more information about using this screen, see Input Screen.

Host Facilities, Remarks Page Fields

Field Name	Description
Remarks	Free-form textual information (up to 32kb).

Host Facilities Links



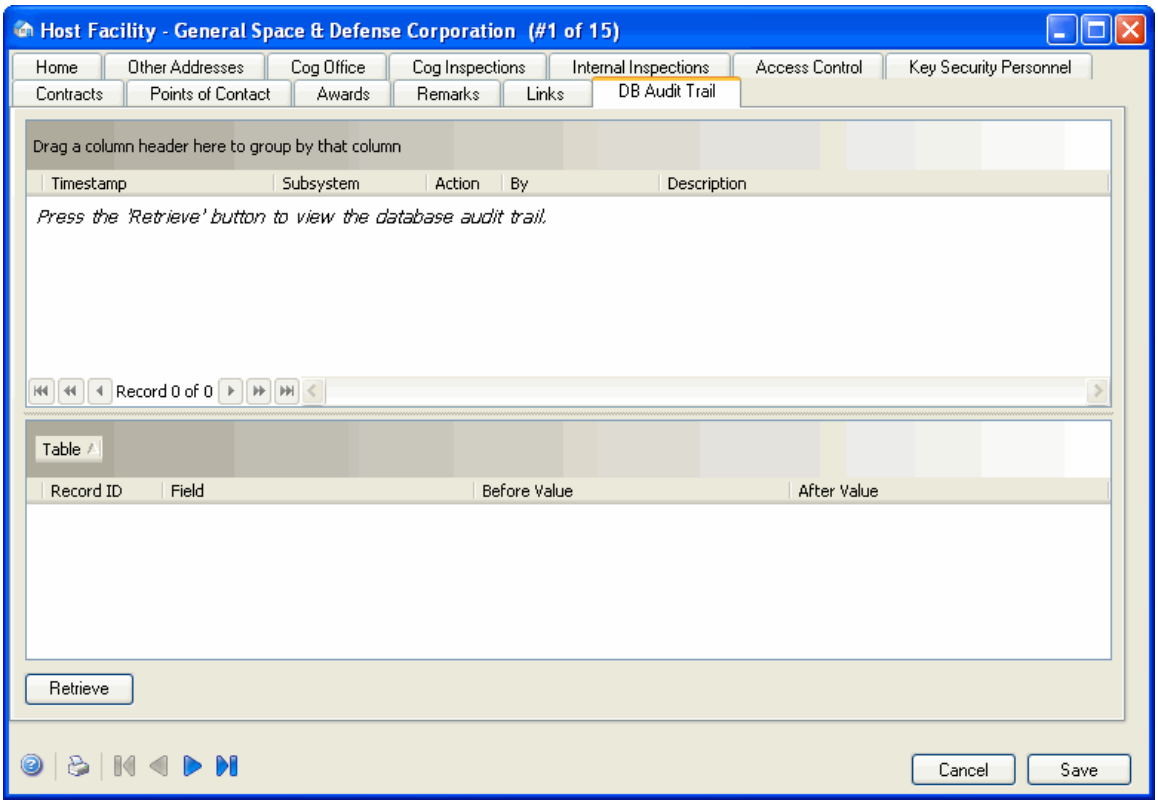
For more information about using this screen, see Input Screen.

Host Facilities, Links Page Fields

Field Name	Description
Description	Displays a brief description of the linked file.
File Path	Displays the full path and file name of the linked file.

Host Facilities DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Host Facilities, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

Host Facilities List

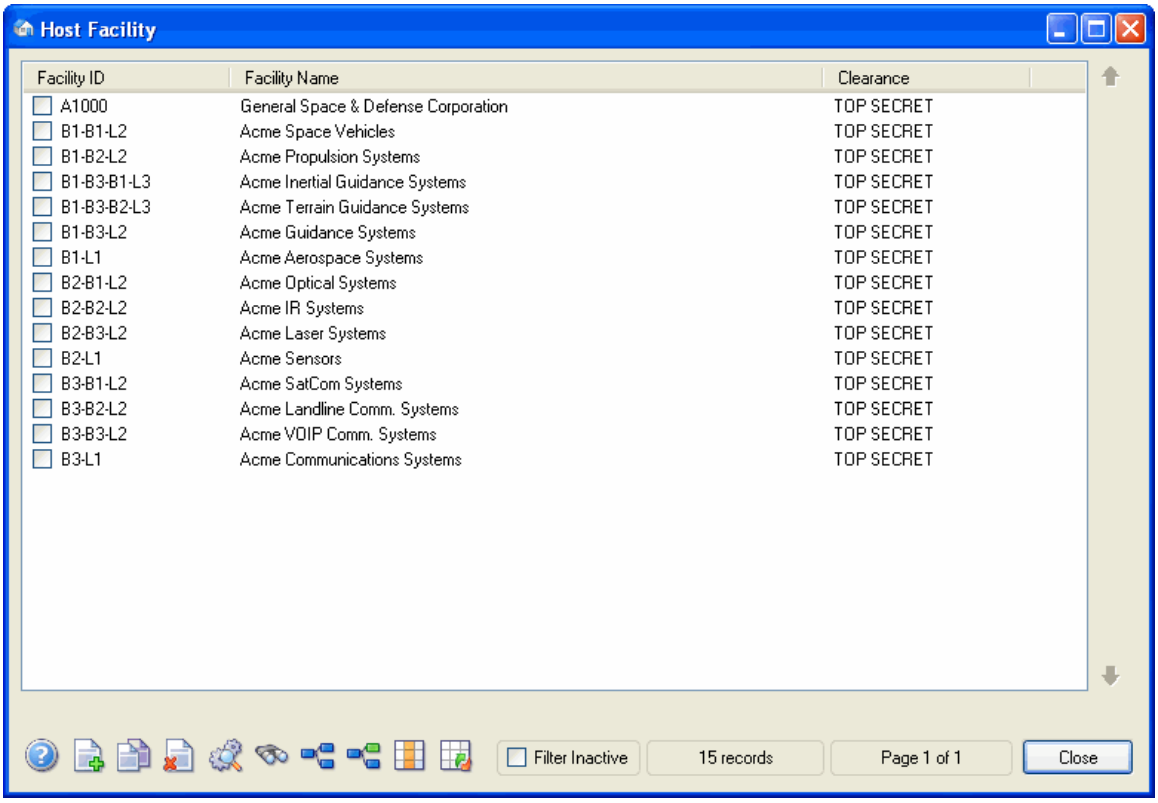
Default Output List Screen

The Host Facilities default output list screen shows the Facility Name, Facility ID, and Clearance Level for each record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.

- Double-click on a record to open an input screen where you can modify the fields.


Host Facility
Facility ID
Facility Name
Clearance
A1000 General Space & Defense Corporation TOP SECRET
B1-B1-L2 Acme Space Vehicles TOP SECRET
B1-B2-L2 Acme Propulsion Systems TOP SECRET
B1-B3-B1-L3 Acme Inertial Guidance Systems TOP SECRET
B1-B3-B2-L3 Acme Terrain Guidance Systems TOP SECRET
B1-B3-L2 Acme Guidance Systems TOP SECRET
B1-L1 Acme Aerospace Systems TOP SECRET
B2-B1-L2 Acme Optical Systems TOP SECRET
B2-B2-L2 Acme IR Systems TOP SECRET
B2-B3-L2 Acme Laser Systems TOP SECRET
B2-L1 Acme Sensors TOP SECRET
B3-B1-L2 Acme SatCom Systems TOP SECRET
B3-B2-L2 Acme Landline Comm. Systems TOP SECRET
B3-B3-L2 Acme VOIP Comm. Systems TOP SECRET
B3-L1 Acme Communications Systems TOP SECRET
Filter Inactive
15 records
Page 1 of 1
Close

Filter Inactive
Check the **Filter Inactive** check box to prevent archived facilities from appearing in the output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Host Facilities Reports

Reports Menu

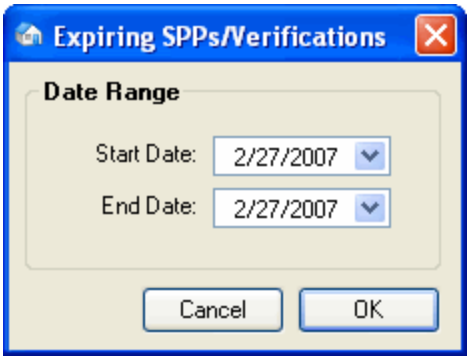
For more information about the default reports that appear in every module, see:

- Standard Reports

The rest of this page describes module-specific reports.

Expiring SPPs\Verifications

This report lists the host facilities whose SPPs needs to be reviewed during a given time span. Enter the starting and ending dates of the time range.



SIMS compares the date of the next scheduled SPP review for each Host facility with the Start and End dates you enter. If a facility's next SPP review date falls between the dates specified, then that facility appears in the Expiring SPPs report.

Facilities by Special Access

This report lists the host facilities associated with each special access, as defined in Utilities > Special Access Definitions.

Facility Special Access Count

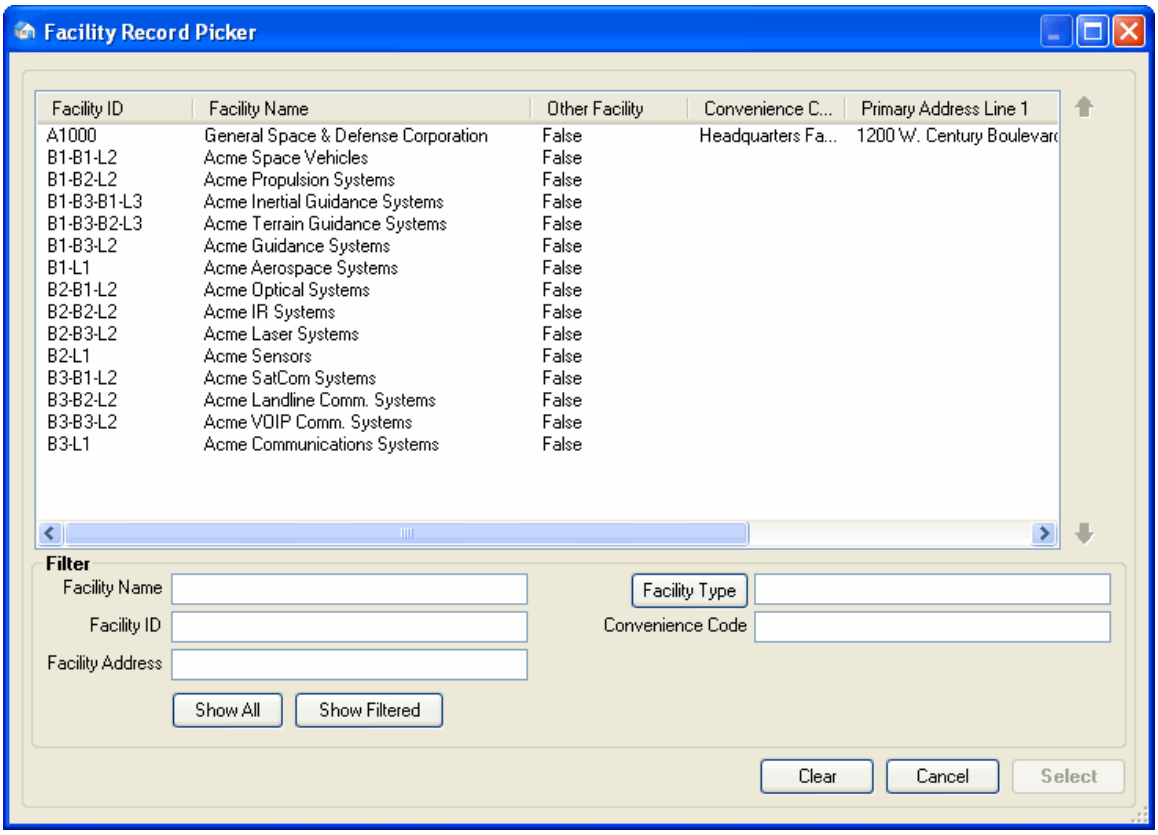
This report provides a count of personnel that are associated with the selected facility for a selected Special Access, as shown below:

Facility Special Access Count
NATO

Facility ID	Facility Name	Submitted	Granted	Briefed	Count
A1000	General Space & Defense Corporation	0	0	4	4
	Totals:	0	0	4	4

Host Facilities - Facility Record Picker

You can use Facility Record Picker throughout SIMS, wherever you can select a facility. This dialog box allows you to search for a facility by name or ID. For more information about using this screen, see Pick Lists and Pickers.


Facility Record Picker
Facility ID
Facility Name
Other Facility
Convenience C...
Primary Address Line 1
A1000
General Space & Defense Corporation
False
Headquarters Fa...
1200 W. Century Boulevar
B1-B1-L2
Acme Space Vehicles
False
B1-B2-L2
Acme Propulsion Systems
False
B1-B3-B1-L3
Acme Inertial Guidance Systems
False
B1-B3-B2-L3
Acme Terrain Guidance Systems
False
B1-B3-L2
Acme Guidance Systems
False
B1-L1
Acme Aerospace Systems
False
B2-B1-L2
Acme Optical Systems
False
B2-B2-L2
Acme IR Systems
False
B2-B3-L2
Acme Laser Systems
False
B2-L1
Acme Sensors
False
B3-B1-L2
Acme SatCom Systems
False
B3-B2-L2
Acme Landline Comm. Systems
False
B3-B3-L2
Acme VOIP Comm. Systems
False
B3-L1
Acme Communications Systems
False
Filter
Facility Name
Facility ID
Facility Address
Facility Type
Convenience Code
Show All
Show Filtered
Clear
Cancel
Select

Other Facilities

Purpose of Other Facilities

The Other Facilities module stores data about the facilities of other companies or entities with whom you do business. The company name, facility ID, address, phone, clearance level, point of contact, etc. are some of the items that comprise the Other Facilities module. This information is useful when communicating with other facilities in regards to security matters. Checking the date of the last verification of other facilities clearances or generating mailing lists are examples of using the Other Facilities module.

The Other Facilities module is separate from the Other Facilities selections within other modules to simplify database reporting.

The following modules use information from the Other Facilities module:

- Classified Contracts
- Classified Documents
- DoD Outgoing Requests
- DoE Outgoing Requests
- SCI Outgoing Requests
- Visitors
- Visit Authorizations

Input Screen Description
Home
Other Addresses
Cog Office
Cog Inspections
Access Control
Key Security Personnel
Contracts
Points of Contact
Awards
Remarks
Links

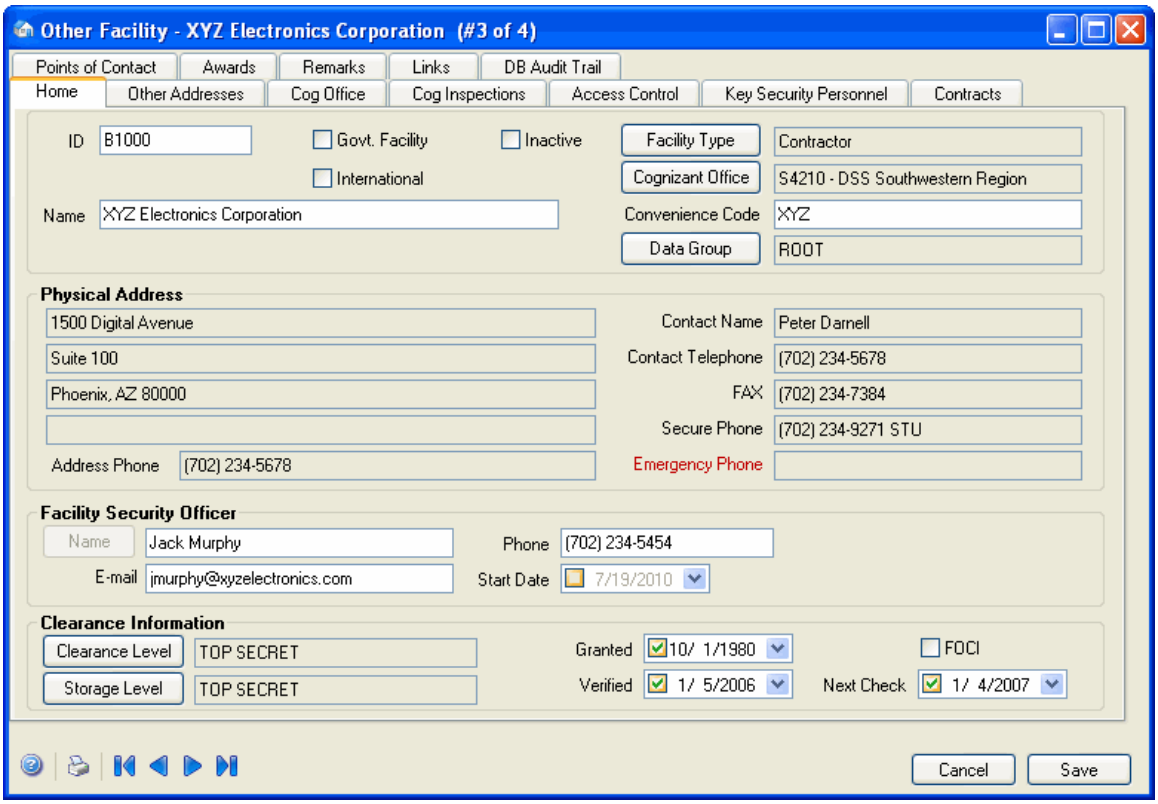
List Screen Description
Default Output List

Reports
Reports

Facility Record Picker
Facility Record Picker

Other Facilities Input

Other Facilities Home



For more information about using this screen, see Input Screen.

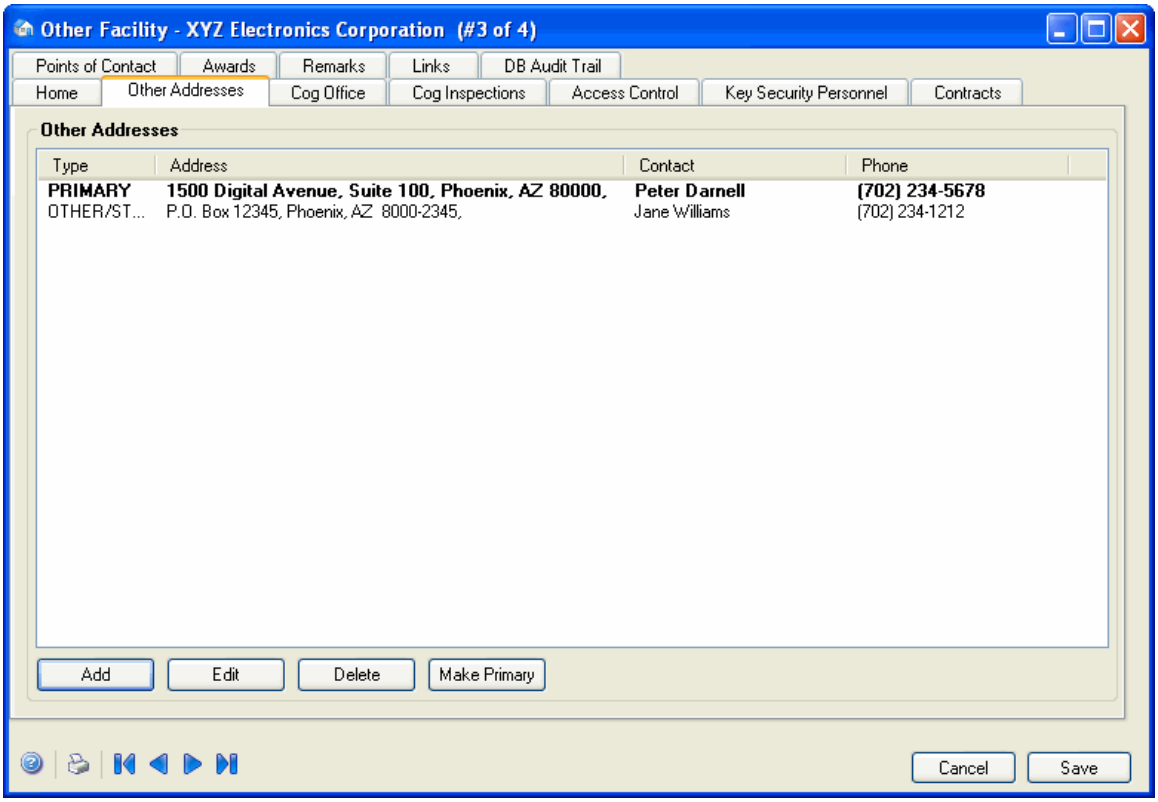
Other Facilities, Home Page Fields

Field Name	Description
ID	The ID is typically the Contractor and Government Entity Code (CAGE Code). If a facility does not have an actual CAGE code (some government facilities do not), enter a unique alphanumeric identifier in the ID field. Note that JPAS must be used to obtain a unique identifier for both government and cleared contractor facilities.
Inactive	Check this box if the facility is no longer active.
Govt. Facility	Check this box if this is a government facility.
Name	The name of the facility.
International	Check this box if this is an international facility.
Type	The type of facility. The options are defined in Utilities List Management.
Cognizant Office	Click to select the appropriate cognizant security office. Government facilities typically do not have a cognizant agency.

Convenience Code	Enter an acronym, "tri-graph," or abbreviation that identifies the facility.
Data Group	The data group that the facility belongs to. Data groups are defined in the User Management Data Groups dialog.
Physical * *Address	The address of the facility. Note that on the Home tab this information is read-only. To enter information, click the Other Addresses tab and enter information for the primary address.
Address Phone	The facility's telephone number.
Contact Name	The name of the facility's Point of Contact (PoC). Note that on the Home tab this information is read-only. To enter information, click the Other Addresses tab and enter information for the primary address.
Contact Telephone	The PoC's telephone number. Note that on the Home tab this information is read-only. To enter information, click the Other Addresses tab and enter information for the primary address.
FAX	The facsimile telephone number of the facility. Note that on the Home tab this information is read-only. To enter information, click the Other Addresses tab and enter information for the primary address.
Secure Phone	The telephone number for any secure telephone in the facility. Note that on the Home tab this information is read-only. To enter information, click the Other Addresses tab and enter information for the primary address.
Emergency Phone	The emergency telephone number of the facility. Note that on the Home tab this information is read-only. To enter information, click the Other Addresses tab and enter information for the primary address.
Facility Security Officer-Name	The name of the Facility Security Officer (FSO).
FSO e-mail	The FSO's e-mail address.
FSO Phone	The FSO's telephone number.
FSO Start Date	The date the individual became the FSO.
Clearance Level	The maximum security clearance level of the facility.

Storage Level	The maximum storage level of the facility.
Granted	The date that the facility's security clearance was granted.
Verified	The date of the last verification of the Other Facilities clearance.
FOCI	Select this if the facility is under foreign ownership, control, or influence.
Next Check	The date that the next clearance verification is required.

Other Facilities Other Addresses



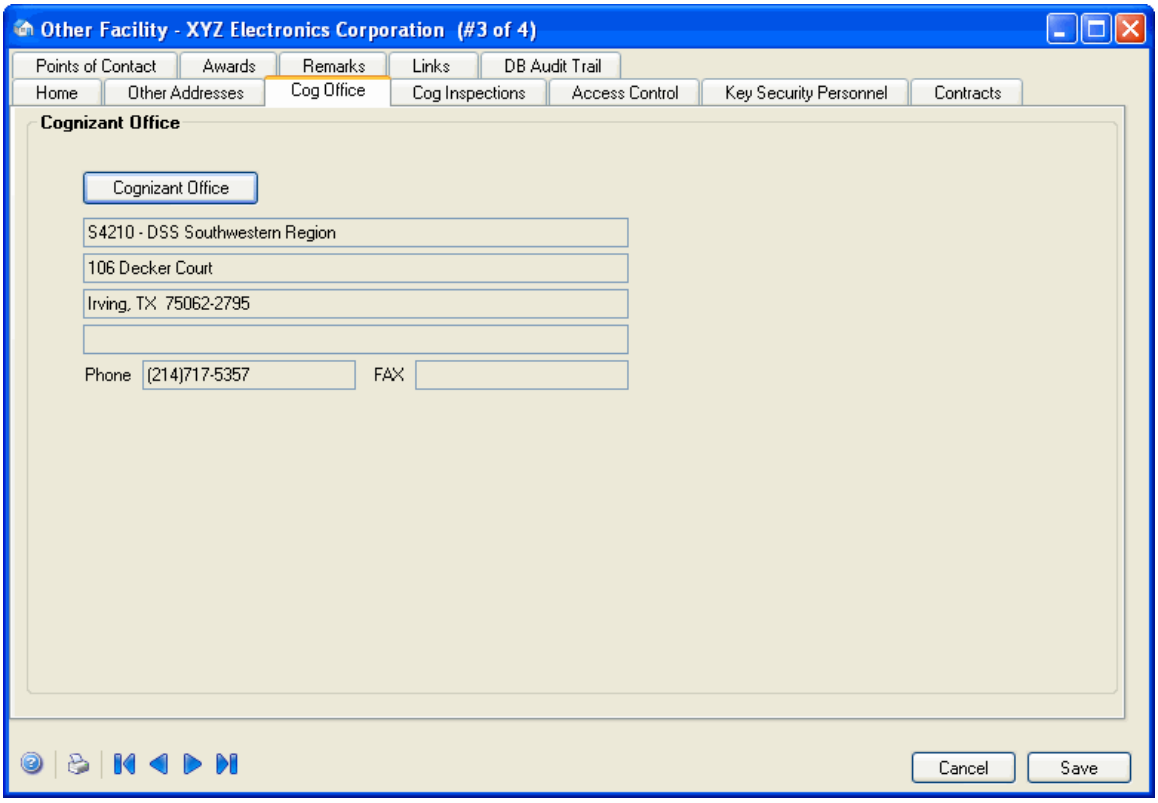
For more information about using this screen, see Input Screen.

Other Facilities, Other Addresses Page Fields

Field Name	Description

Type	A way to identify any other address (PRIMARY, OTHER, SHIPPING, etc.). Address Types are defined in Utilities > List Management. The primary address type is the address displayed on the Home tab of the Facility Input screen.
Address	The full address.
Contact	The name of the Point of Contact (PoC).
Phone	The telephone number for the PoC.

Other Facilities Cog Office



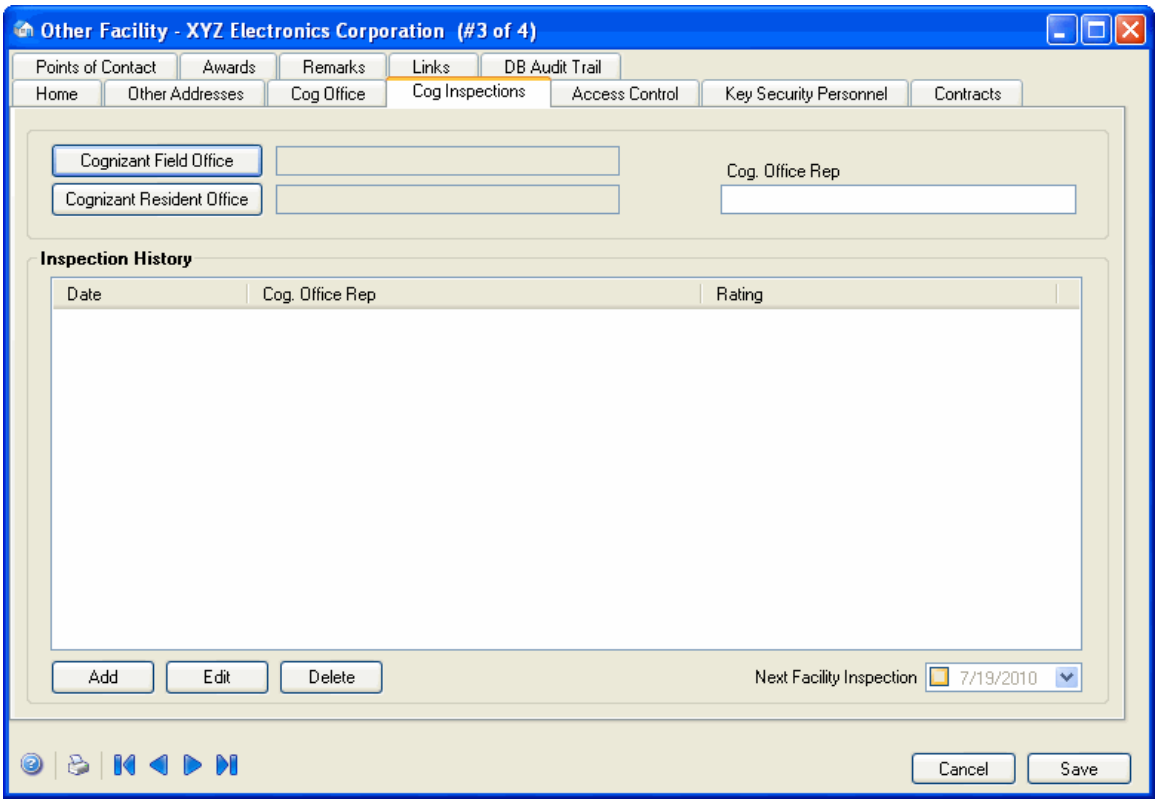
For more information about using this screen, see Input Screen.

Other Facilities, Cog Office Page Fields

Field Name	Description
Cognizant Office	Click this button to select a cognizant office from the Cognizant Offices module and attach it to this facility.
Phone	The telephone number of the cognizant office.

FAX	The facsimile telephone number of the cognizant office.

Other Facilities Cog Inspections



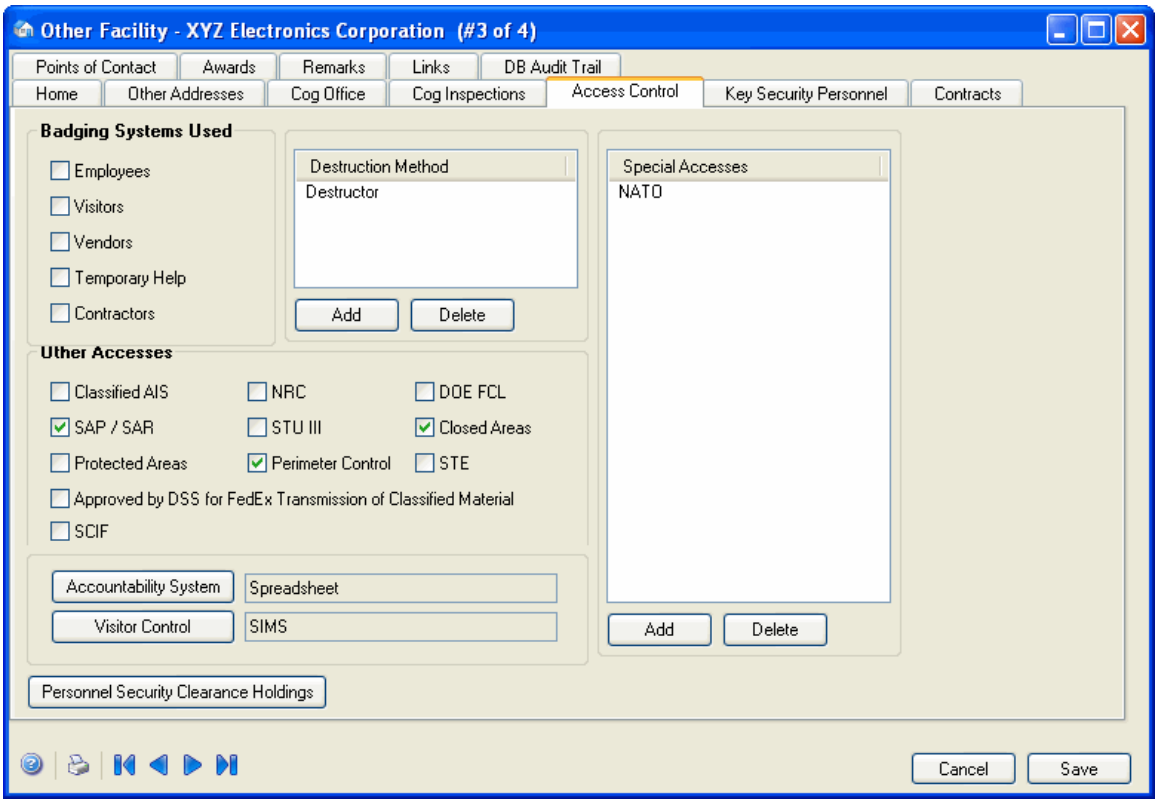
For more information about using this screen, see Input Screen.

Other Facilities, Cog Inspections Page Fields

Field Name	Description
Cognizant Field Office	Click this button to select a cognizant field office.
Cognizant Resident Office	Click this button to select the cognizant resident office.
Date	The date of the cognizant office inspection.
Cog. Office Rep	Enter the name of the cognizant office representative.
Rating	The rating of the cognizant office, based on the most recent inspection.
Remarks	Any remarks related to the inspection.
Add to History	Click this button to add the information to the inspection history.

Inspection History	Displays a history of the inspections performed on the cognizant office.
Next Facility Inspection	The date the facility is scheduled for its next inspection.

Other Facilities Access Control



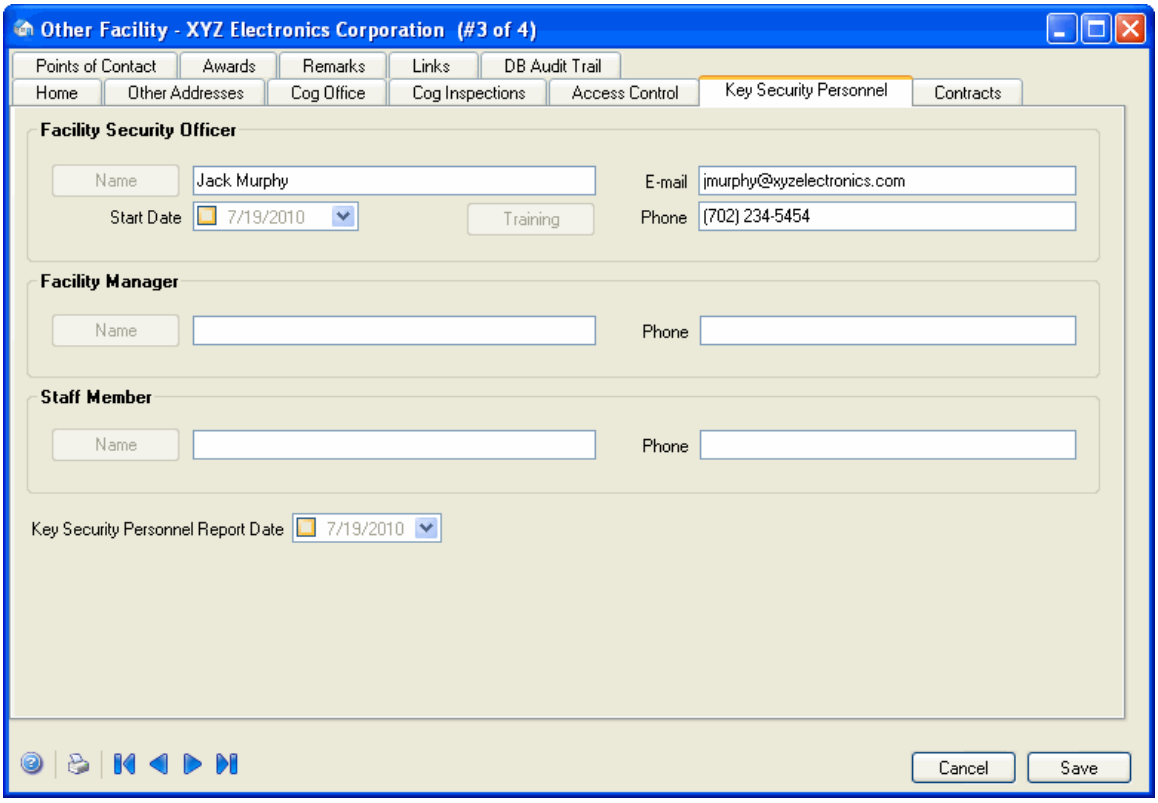
For more information about using this screen, see Input Screen.

Other Facilities, Access Control Page Fields

Field Name	Description
Badging System Used	Select all items that apply to the badging system used for this facility.
Destruction Method	Select the destruction methods used by this facility.
Other Accesses	Select all items that pertain to other accesses for this facility.
Approved by DSS for FedEx Transmission of material?	Select this option if this facility can receive classified material via Federal Express.

Personnel Security Clearance Holdings	Click this button to display a list of the number of clearances held by this facility, subtotaled by each clearance level.
Accountability System	Select the accountability system used by this facility.
Visitor Control	Select the visitor control system used by this facility.
Special Accesses	Add or remove any special accesses held by this facility. Special accesses are defined in Utilities > Special Access Definitions.

Other Facility Key Security Personnel



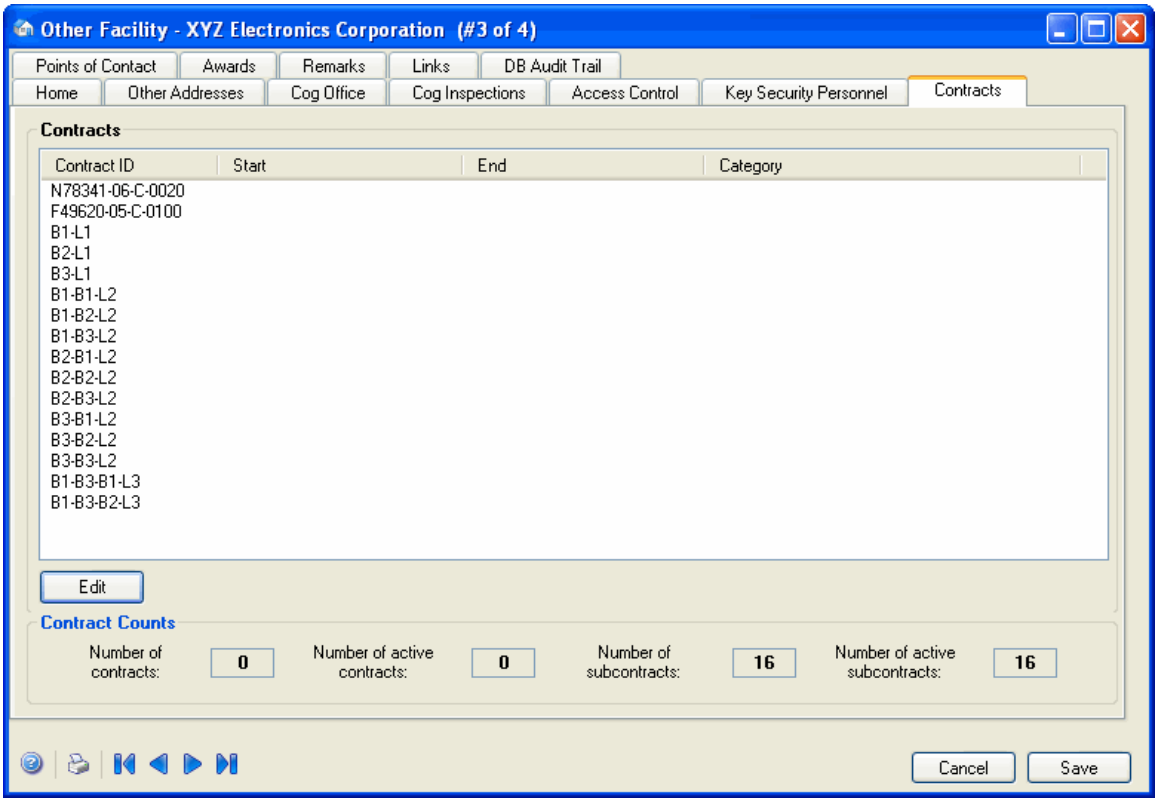
For more information about using this screen, see Input Screen.

Host Facilities, Key Security Personnel Page Fields

Field Name	Description
Facility Security Officer-Name	Enter the name of the Field Security Officer (FSO).
Start Date	The date the FSO started.
E-mail	Enter the FSO's email address.

Phone	Enter the FSO's telephone number.
Facility Manager-Name	Enter the name of the Facility Manager.
Facility Manager-Phone	Enter the Facility Manager's telephone number.
Staff Member-Name	Enter the name of a key staff member.
Staff Member-Phone	Enter the Staff Member's telephone number.
Key Security Personnel Report Date	The date of the last Key Security Personnel report.

Other Facilities Contracts



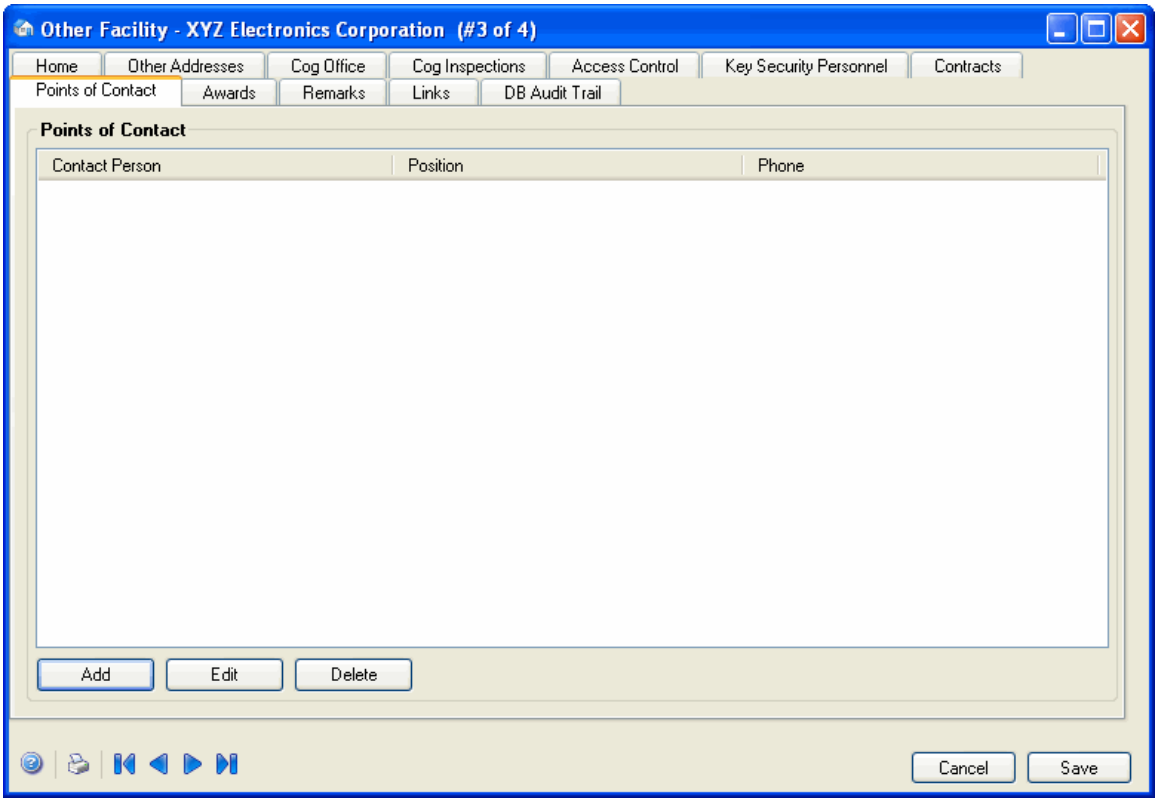
For more information about using this screen, see Input Screen.

Other Facilities, Contracts Page Fields

Field Name	Description
Contract ID	Displays a list of contracts where this facility has been identified as a Performing Facility.
Start	The start date of the contract.

End	The end date of the contract.
Category	The contract category.
Contract Counts	Displays a count of current contracts for this facility.

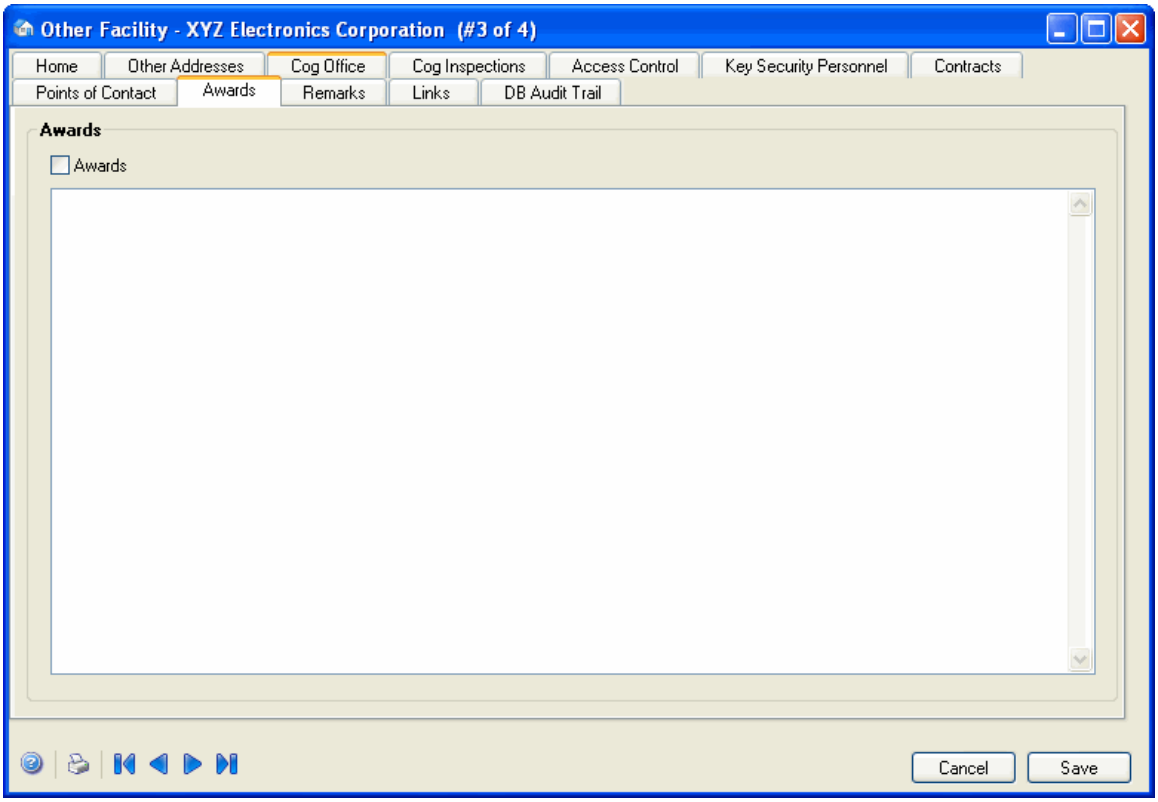
Other Facilities Points of Contact



For more information about using this screen, see Input Screen.
Other Facilities, Points of Contact Page Fields

Field Name	**Description**
Contact Person	The name of the Point of Contact (PoC) associated with this other facility.
Position	The PoC's position or title.
Phone	The PoC's telephone number.
Notes	Any notes related to the PoC.

Other Facilities Awards

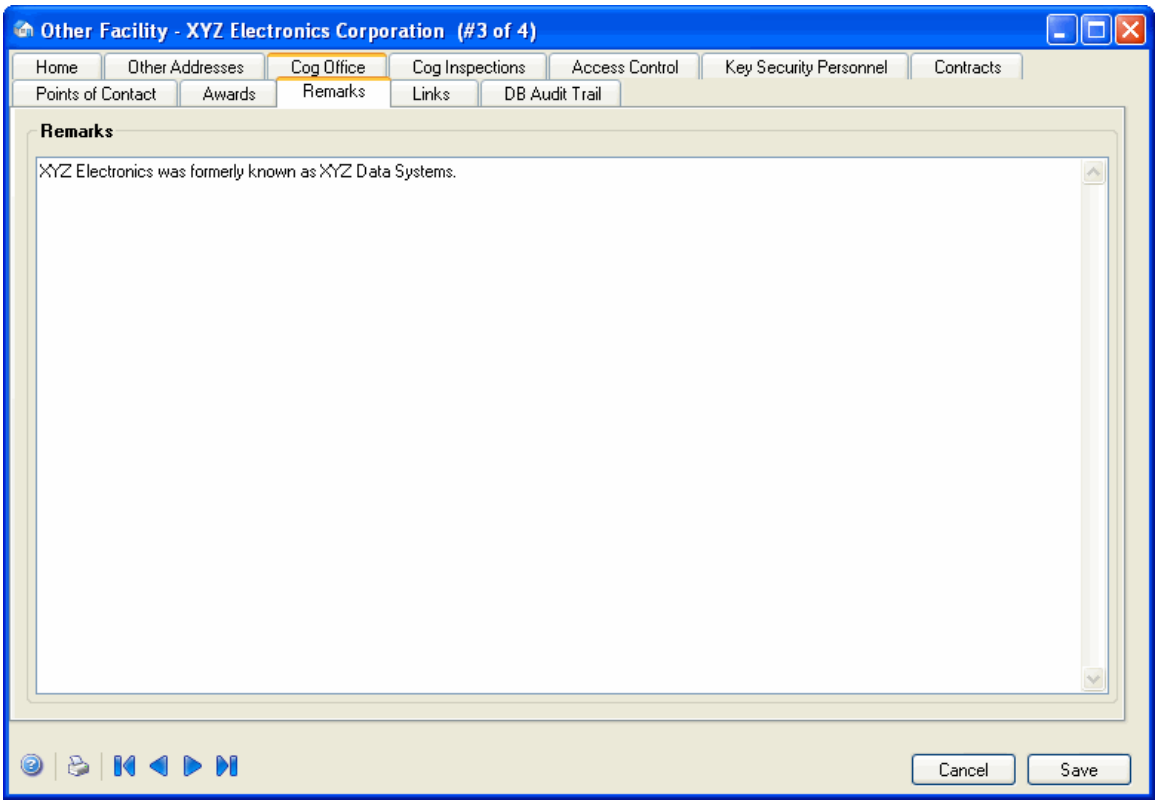


For more information about using this screen, see Input Screen.

Other Facilities, Contracts Page Fields

Field Name	Description
Awards	Enter a description of the awards that the facility has received in the space provided.

Other Facilities Remarks

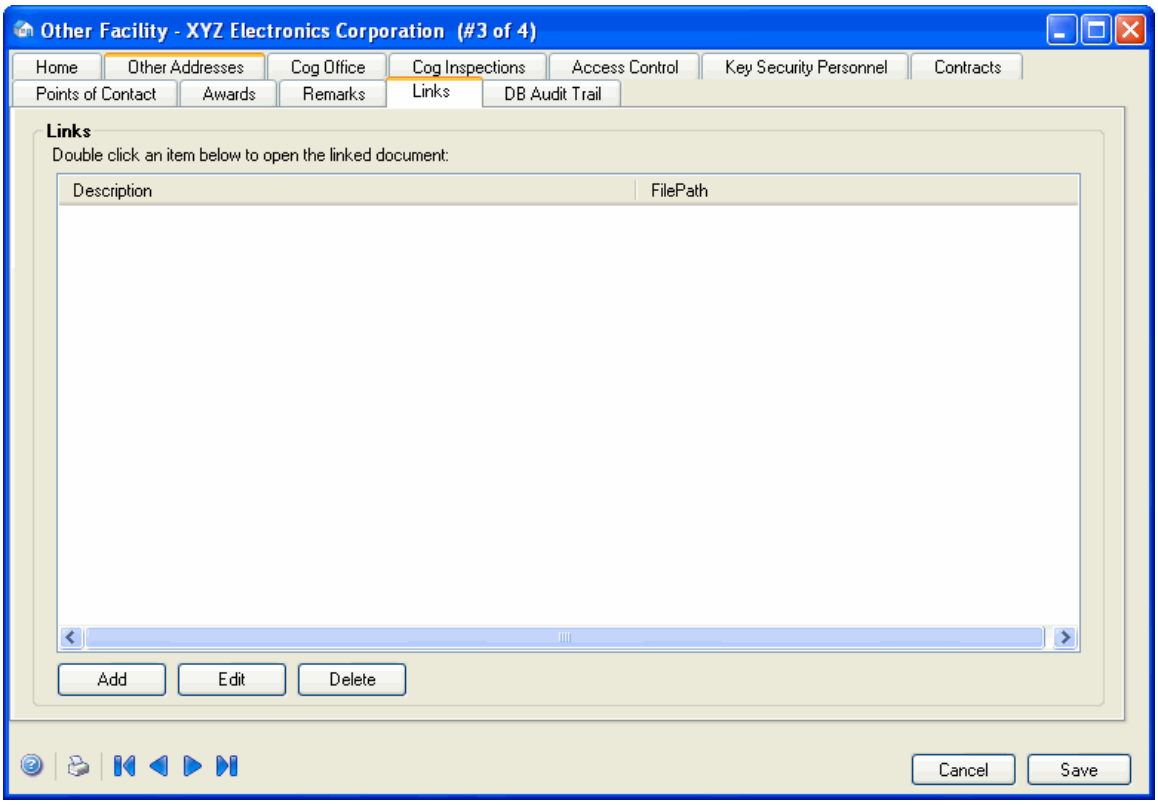


For more information about using this screen, see Input Screen.

Other Facilities, Remarks Page Fields

Field Name	Description
Remarks	Free-form textual information (up to 32kb).

Other Facilities Links



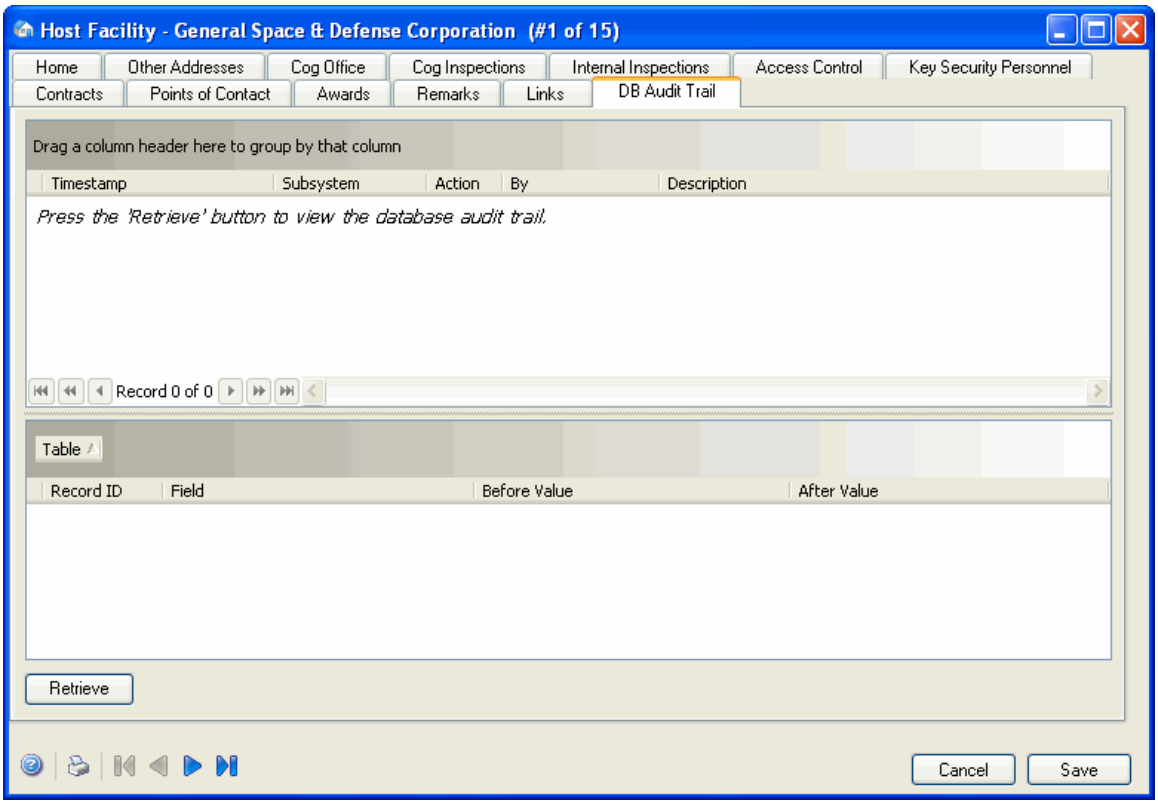
For more information about using this screen, see Input Screen.

Other Facilities, Links Page Fields

Field Name	Description
Description	Displays a brief description of the linked file.
File Path	Displays the full path and file name of the linked file.

Other Facilities DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Other Facilities, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

Other Facilities List

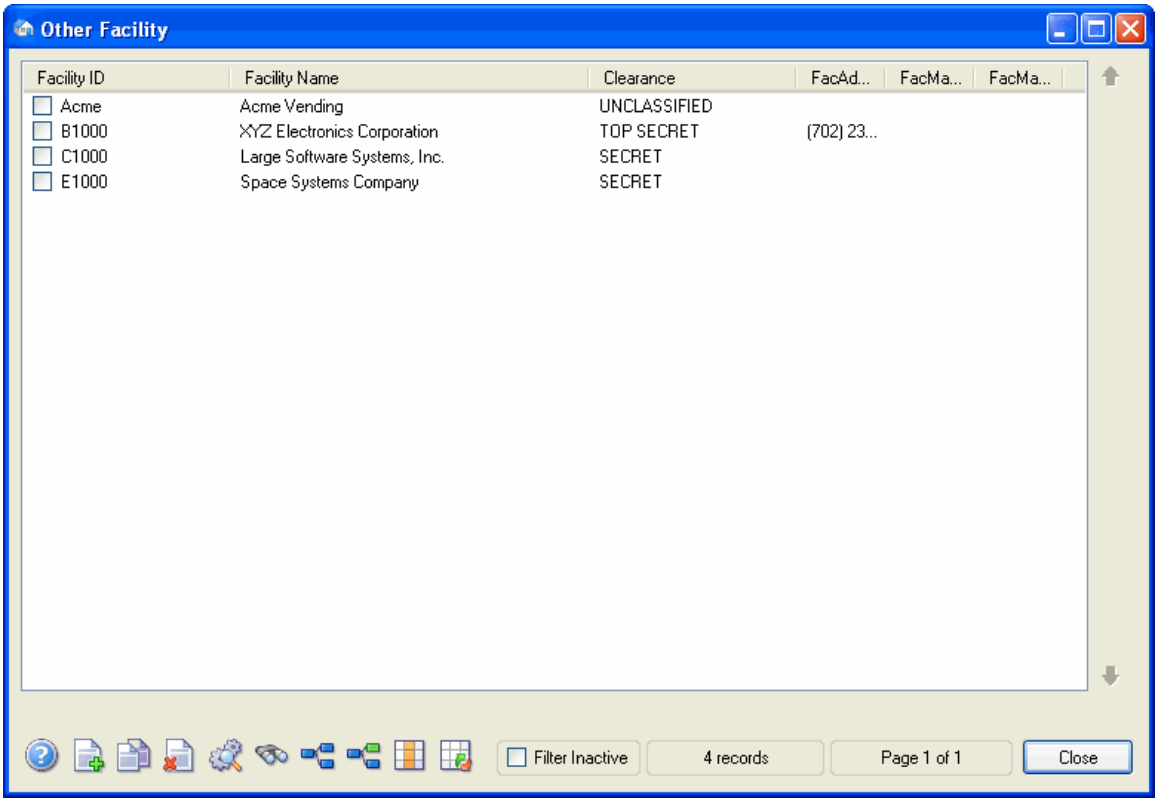
Default Output List Screen

The Other Facilities default output list screen shows the Facility Name, Facility ID, and Clearance Level for each record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.

- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** check box to prevent archived files from appearing on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Other Facilities Reports

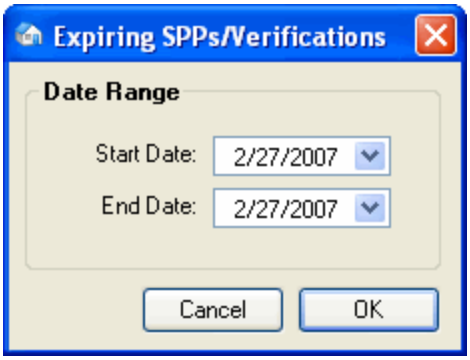
Reports Menu

For more information about the default reports that appear in every module, see:

- Standard Reports

The rest of this page describes module-specific reports.

Expiring SPPs\Verifications
This report lists the Other Facilities whose SPPs needs to be reviewed during a given time span. Enter the starting and ending dates of the time range.



SIMS compares the date of the next scheduled SPP review for each Other Facility with the Start and End dates you enter. If a facility's next SPP review date falls between the dates specified, then that facility appears in the Expiring SPPs/Verifications report.

Facilities by Special Access
This report lists the Other Facilities associated with each special access, as defined in Utilities > Special Access Definitions.

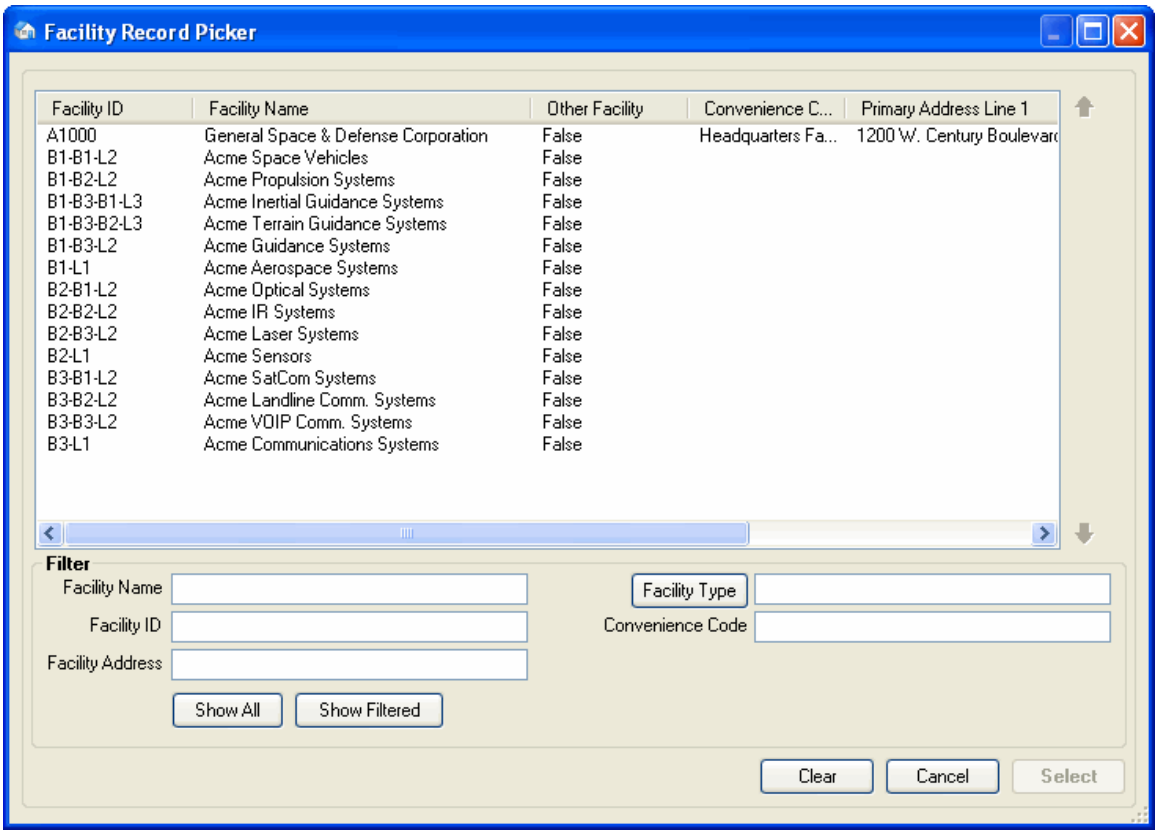
Facility Special Access Count
This report provides a count of personnel that are associated with the selected facility for a selected Special Access, as shown below:

Facility Special Access Count
NATO

Facility ID	Facility Name	Submitted	Granted	Briefed	Count
A1000	General Space & Defense Corporation	0	0	4	4
	Totals:	0	0	4	4

Other Facilities - Facility Record Picker

You can use Facility Record Picker throughout SIMS, wherever you can select a facility. This dialog box allows you to search for a facility by name or ID. For more information about using this screen, see Pick Lists and Pickers.


Facility Record Picker
Facility ID
Facility Name
Other Facility
Convenience C...
Primary Address Line 1
A1000 General Space & Defense Corporation False Headquarters Fa... 1200 W. Century Boulevar
B1-B1-L2 Acme Space Vehicles False
B1-B2-L2 Acme Propulsion Systems False
B1-B3-B1-L3 Acme Inertial Guidance Systems False
B1-B3-B2-L3 Acme Terrain Guidance Systems False
B1-B3-L2 Acme Guidance Systems False
B1-L1 Acme Aerospace Systems False
B2-B1-L2 Acme Optical Systems False
B2-B2-L2 Acme IR Systems False
B2-B3-L2 Acme Laser Systems False
B2-L1 Acme Sensors False
B3-B1-L2 Acme SatCom Systems False
B3-B2-L2 Acme Landline Comm. Systems False
B3-B3-L2 Acme VOIP Comm. Systems False
B3-L1 Acme Communications Systems False
Filter
Facility Name
Facility ID
Facility Address
Facility Type
Convenience Code
Show All
Show Filtered
Clear
Cancel
Select

Cognizant Offices

Purpose of Cognizant Offices

Cognizant Office maintains information for cognizant offices and/or sponsors.

The Cognizant Offices module stores data regarding cognizant offices and/or sponsors. A sampling of some DoD cognizant offices in the Industrial Security Manual (ISM) are pre-stored in this module. You may add or modify cognizant offices.

The following modules use information contained in the Cognizant Offices module:

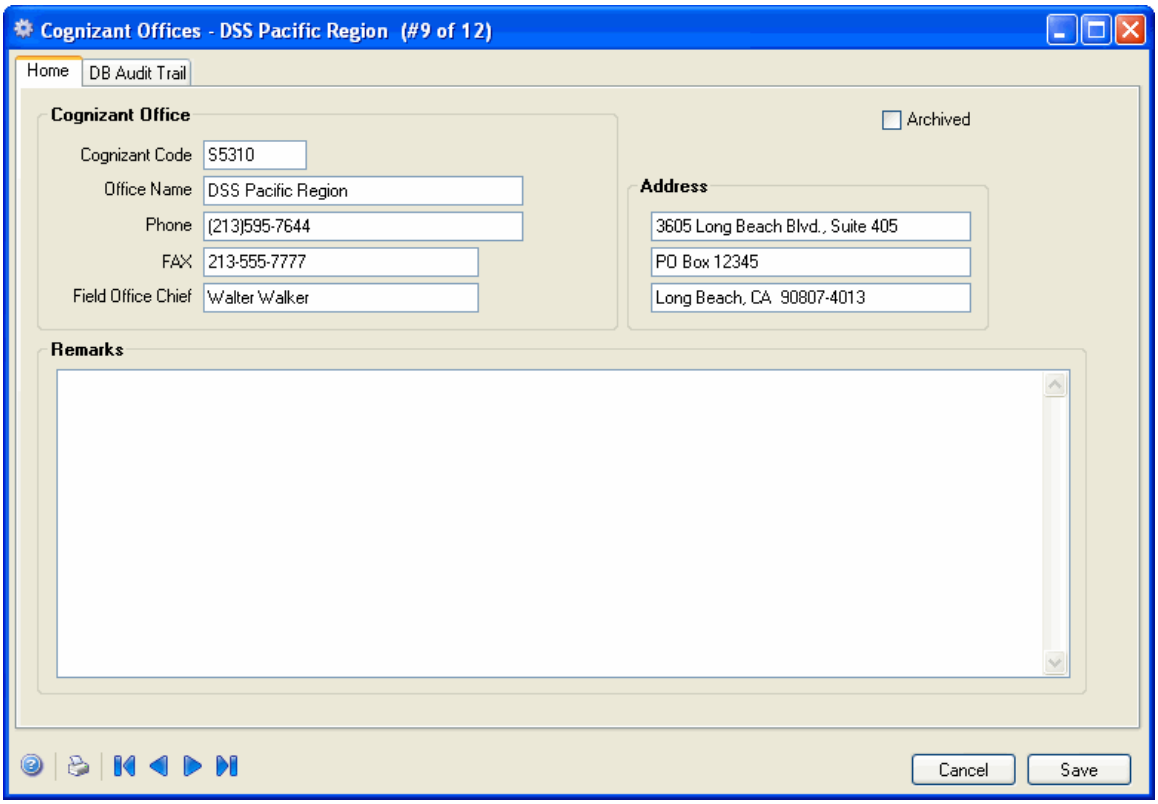
- Classified Contracts
- Host Facilities
- DoD Outgoing Requests
- Other Facilities

List Screen Description
Default Output List

Reports
Reports

Facility Record Picker
Facility Record Picker

Cognizant Offices Home

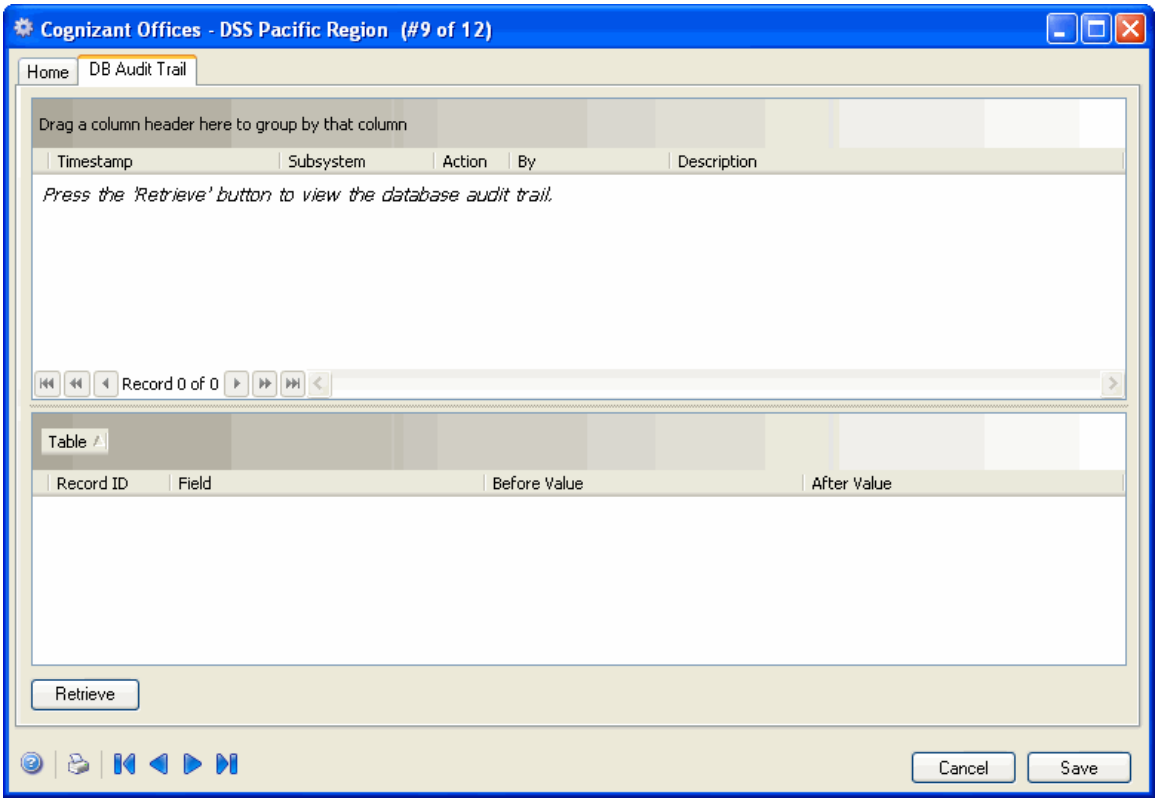


For more information about using this screen, see Input Screen.
Cognizant Offices, Home Page Fields

Field Name	Description
Cognizant Code	Enter the Cognizant Code in this field.
Office Name	The name of the cognizant office.
Phone	The telephone number of the cognizant office.
Fax	The facsimile telephone number of the cognizant office.
Field Office Chief	The name of the Field Office Chief.
Address	The address of the cognizant office.
Remarks	Free-form textual information (up to 32kb).

Cognizant Offices DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



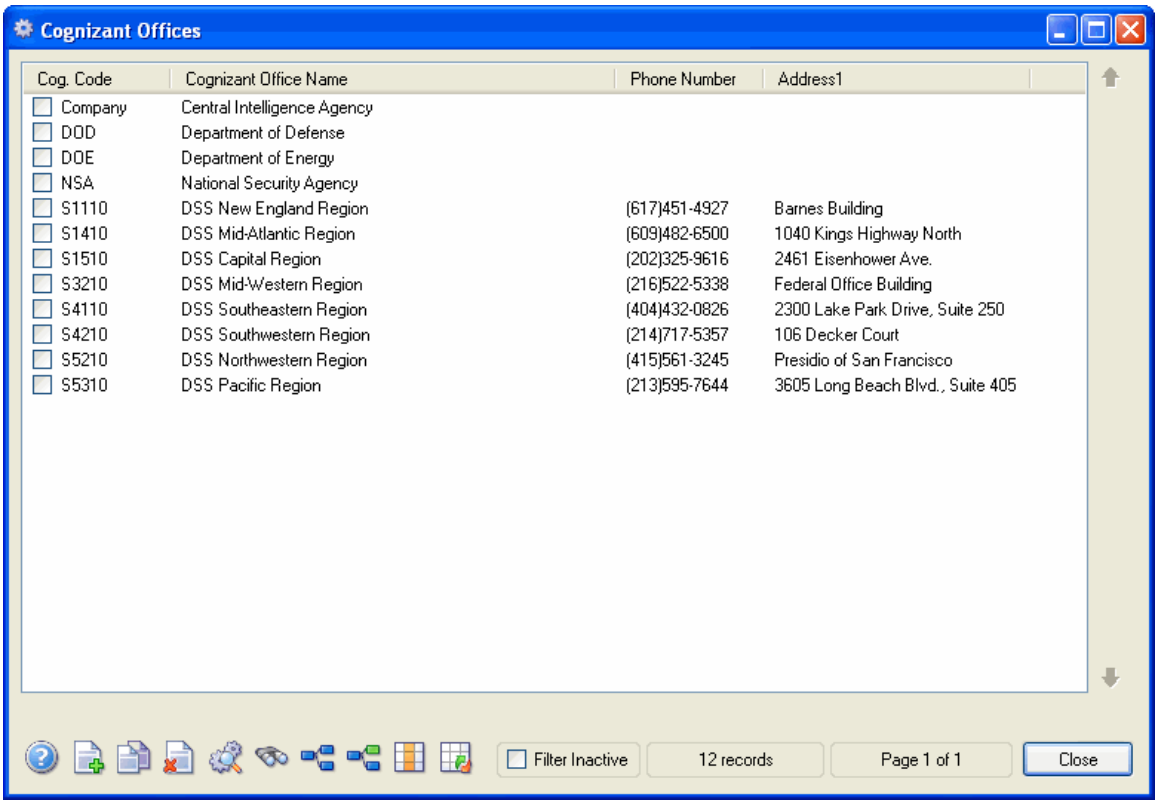
For more information about using this screen, see Input Screen.
Cognizant Offices, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

Cognizant Offices List

Default Output List Screen

The Cognizant Offices default output list screen shows the Cognizant Office Name, Cognizant Code, Phone Number, and Address 1 fields for each record in the module.



Filter Inactive

Check the **Filter Inactive** check box to prevent archived files from appearing on this output screen.

For more information about using this screen, see:

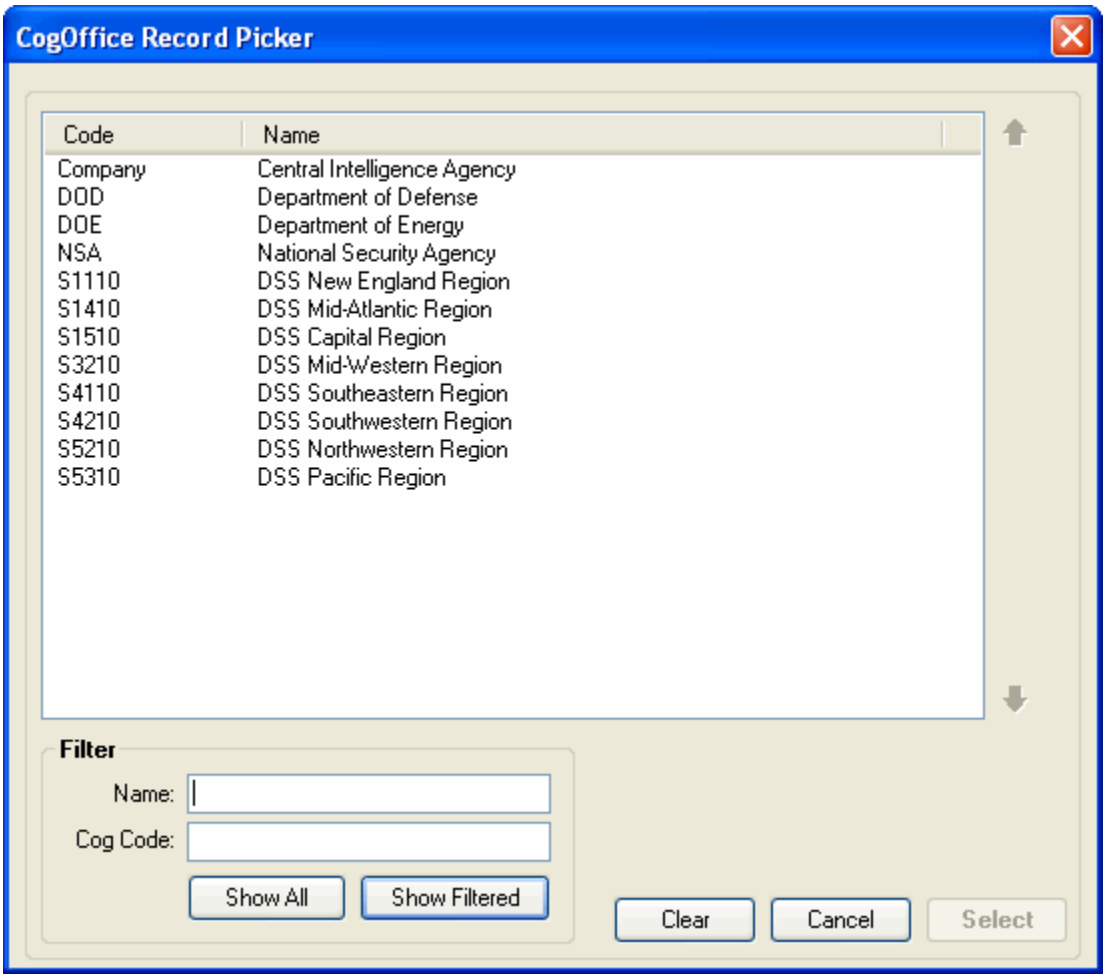
- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Cognizant Offices Reports

Reports Menu
For more information about the reports that appear in this module, see Standard Reports.

Cognizant Offices Record Picker

You can use the Cognizant Offices Record Picker throughout SIMS, wherever you can select a Cognizant Office. This dialog box allows you to search for a Cognizant Office by name or code. For more information about using this screen, see Pick Lists and Pickers.



Cleared Personnel

Purpose of Cleared Personnel

The Cleared Personnel module maintains information about each employee and consultant who has a security clearance or has applied for one. The name, social security number, employee number, clearance level, special accesses allowed, etc. are all recorded in the Cleared Personnel module. The Cleared Personnel module eases the burden of managing clearance and access for everyone at the facility.

Input Screen Description
Home
Clearances
Special Accesses
Employment
Personal
Citizenship
Photo/Signature
Badges
Training
Contacts
Contracts/Vehicles
Military
Foreign Travel/Contacts
Remarks
Links

Clearance Cases
Clearance Information
Applications/Polygraph
Task List
Audit Trail
Remarks

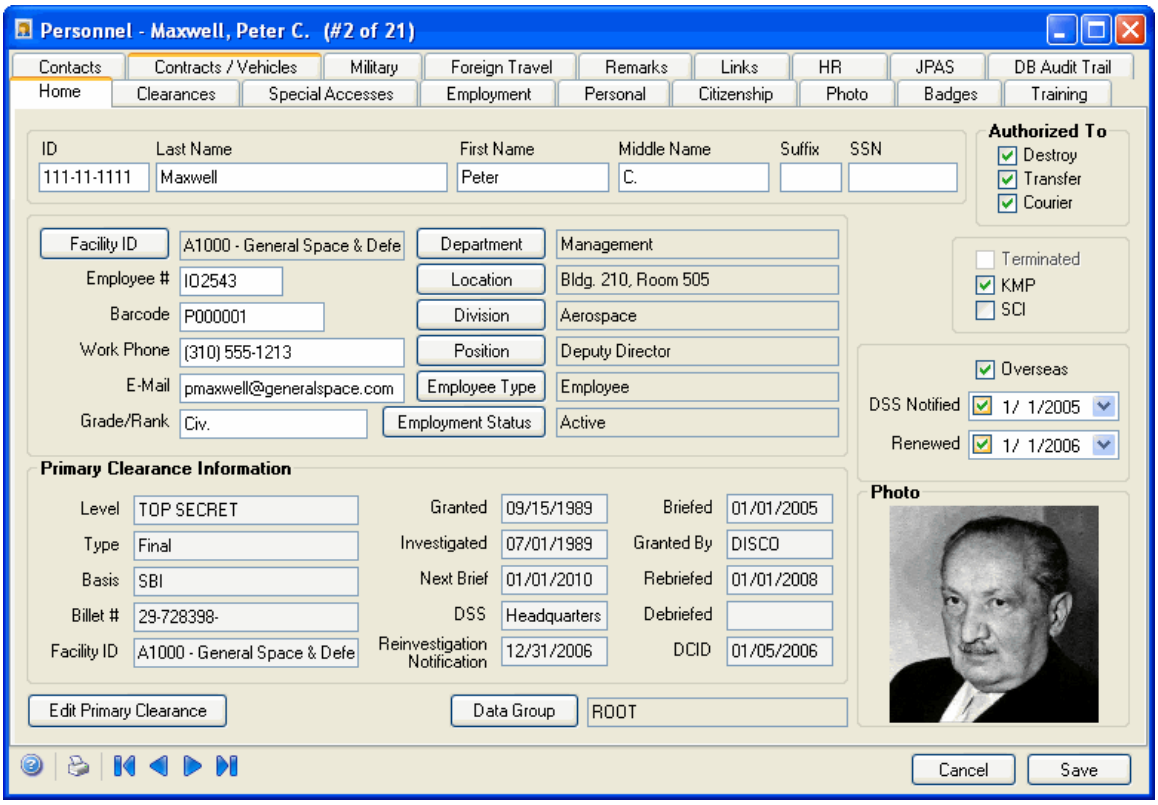
Special Access
Special Accesses
Special Access Tracking

List Screen Description
Default Output List

Reports
Reports

Cleared Personnel Input

Cleared Personnel Home



For more information about using this screen, see Input Screen.

Cleared Personnel, Home Page Fields

Field Name	Description
ID	The ID number of the person.
Last Name	The person's last name.
First Name	The person's first name.
Middle Name	The person's middle name or initial.
Suffix	The suffix of the person's name (i.e. Jr, Sr., I)
SSN	The Social Security number of the person.
Authorized to	Check the appropriate box to indicate if this person is authorized to destroy documents, externally transfer documents, and/or be an authorized courier.
Terminated	If checked, the person is no longer an employee. This box gets checked automatically when a date is entered in the person's **End Date** field on the Employment tab.

Key Management Person	Check this box if the employee is a key management person and needs to show up on the KMP report.
SCI	Use this check box to indicate if the person has any SCI Access.
Facility ID	The ID for the person's Host Facility record. This field establishes a link to the person's facility information. Click **Facility ID** to show the Facility Record Picker. You can set a default for this field when adding new records in the Data Field Defaults Utility.
Employee #	The person's employee number, or any other unique identifier.
Barcode	A unique personnel barcode label may be entered into this field. You can enter this data via the keyboard or scan it in using a barcode reader. The barcode field is optional.
Work Phone	Work telephone number.
Email	The person's email address.
Grade/Rank/Rate	Grade/Rank/Rate field which is also displayed on the Military page.
Department	Department to which the person belongs.
Location	Physical location, such as a building number.
Division	The division in which the person works.
Position	Position or job title.
Employee Type	Employee type.
Employment Status	Employment status.
Overseas	Check this box if the employee is located overseas.
DSS Notified	The most recent date when this person's information was reported to the DSS. Overseas classified activity has to be reported to DSS regularly for authorization.

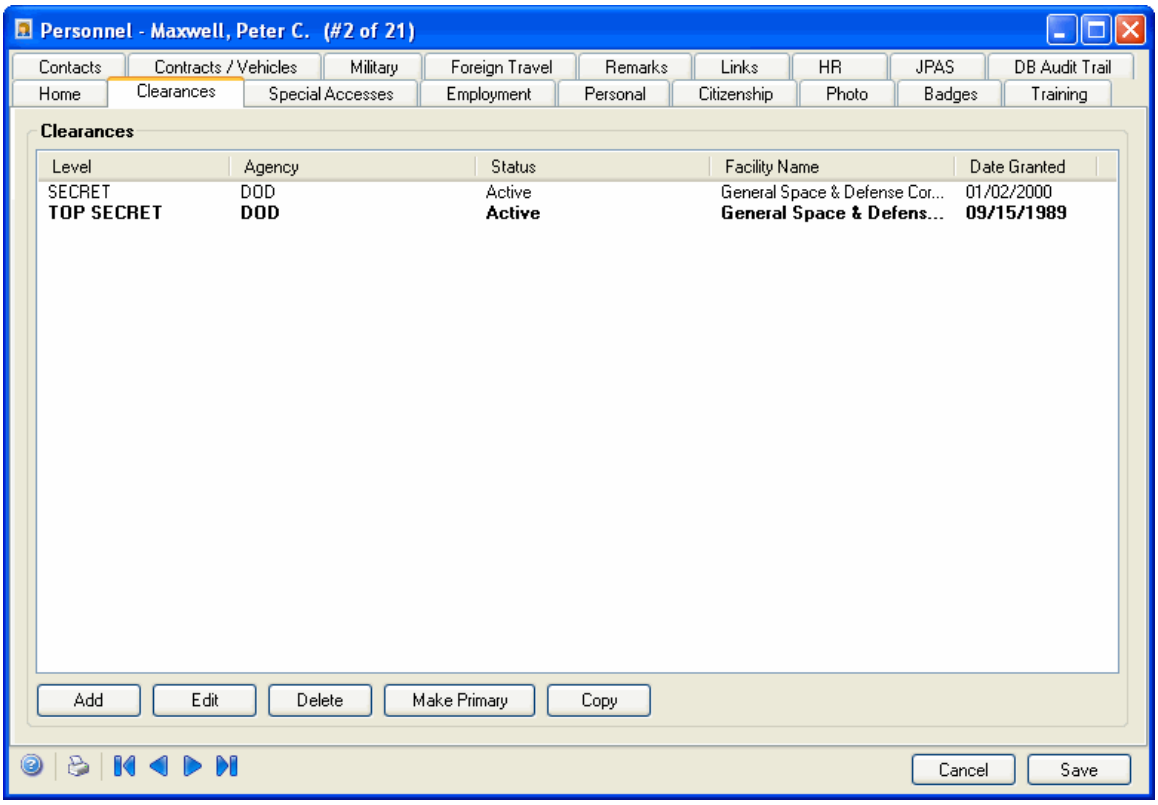
Renewed	If Overseas is checked and the DSS Notification Date has changed, set the **Renewed** field to that date plus 3 years. Create a task record for the clearance case to renew.
Level	The person's clearance level.
Type	The person's clearance level type.
Basis	The basis for the clearance investigation such as a NAC, EBI, SBI, or SSBI.
Billet #	A billet number associated with the person's security clearance.
Facility ID	The facility identification number for this clearance.
Granted	The date the person's clearance was granted.
Investigated	The date of investigation associated with the basis of the clearance.
Next Brief	The date the person is scheduled to receive another security clearance briefing.
DSS	The DSS department/entity that approved the DCID.
Reinvestigation Notification	Date for future reinvestigation of the clearance.
Briefed	The date of the last briefing for the person's security clearance.
Granted By	The name of the agency that granted the clearance.
Rebriefed	The date that the clearance application was received by the clearance processing authority.
Debriefed	The date the persons' clearance was de-briefed. A date in this field effectively makes the clearance inactive.
DCID	The date of DCID (Director of Central Intelligence Directive) approval.
Photo	Picture of the individual. To add or delete a photo, click the Photo, Signature tab.

Data Group	The data group that the person belongs to. Data groups are defined in the User Management Data Groups dialog.

Cleared Personnel Clearances

Cleared Personnel Clearances

This screen shows a list of all clearances held by the individual.



For more information about using this screen, see Input Screen.

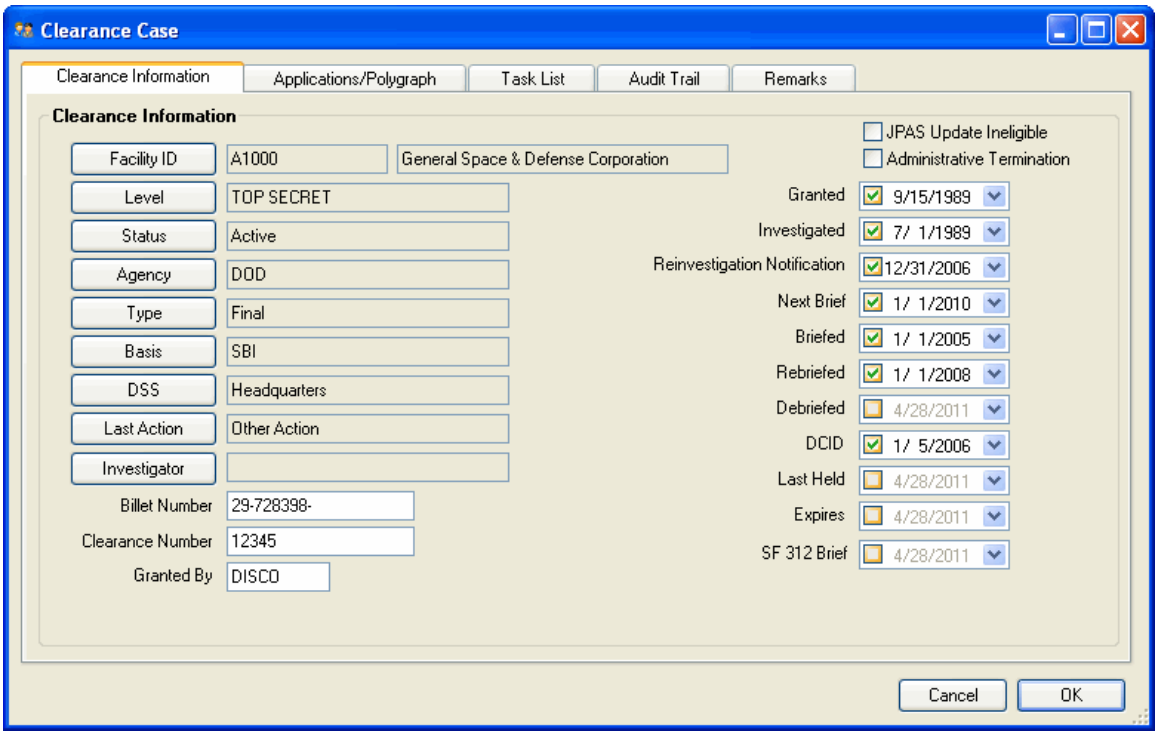
Cleared Personnel, Clearances Page Fields

Field Name	Description
Level	Name of the clearance level.
Status	Current status of the clearance, such as Pending, Active, or Debriefed. The choices are part of a pick list defined in the Utilities List Management area.
Facility Name	The name of the facility that holds the clearance.
Date Granted	The date the clearance was granted.

Make Primary	Click to make selected clearance the primary clearance. The primary clearance is displayed in **bold**. One clearance may be designated as primary.
Copy	Click to copy a selected clearance.

Clearance Case Clearance Information

This page appears when you click **Add or Edit** on the Cleared Personnel, Clearances screen. Clearance levels are defined by going to Utilities > Clearance Levels. Clearance validations can be turned on/off by going to Personnel System Customization settings.



For more information about using this screen, see Input Screen.

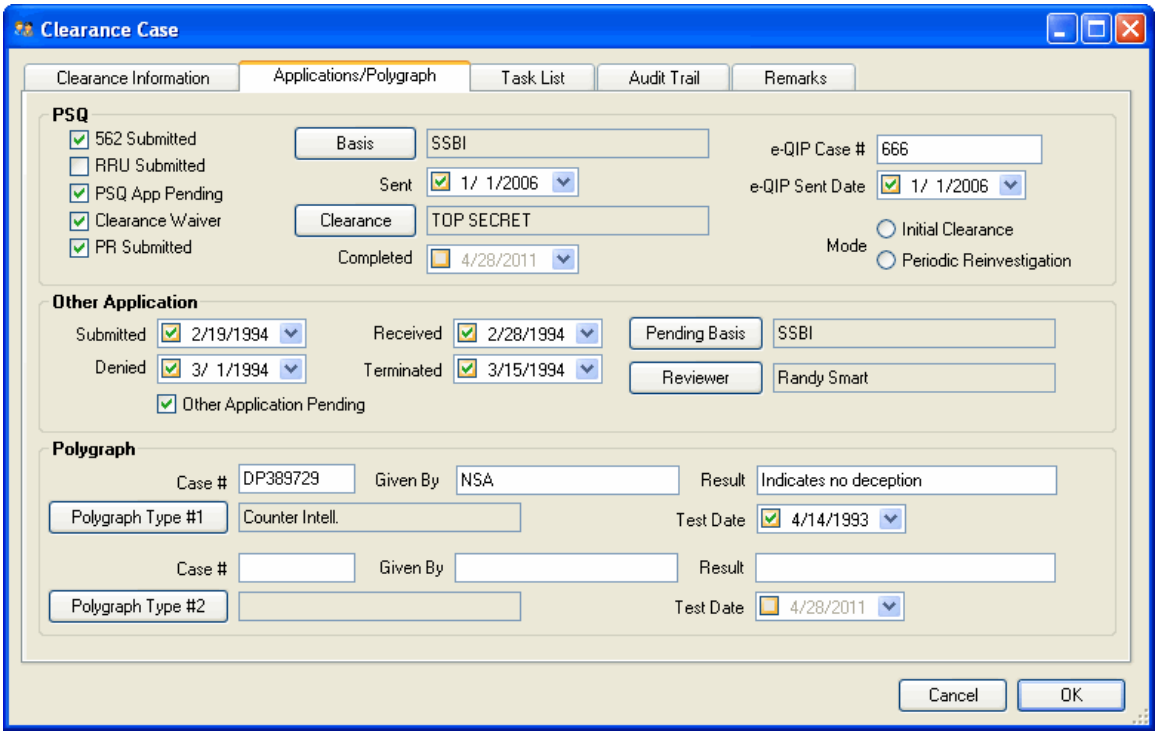
Clearance Case, Information Page Fields

Field Name	Description
Facility ID	The Cage Code for the facility that holds the clearance. The adjacent field identifies the facility name.
Level	The level of this clearance.
JPAS Update Ineligible	If checked, this clearance record will not be eligible when doing a JPAS update.

Administrative Termination	Check if this clearance was administratively terminated, as opposed to expiring on a certain date.
Status	Current status of the clearance (Active, Terminated, etc.).
Agency	The agency: DoD (Dept of Defense), DoE (Dept of Energy), or DoJ (Dept of Justice).
Type	The type of clearance (final, interim, etc.).
Basis	The basis for the other clearance investigation, such as an SBI or SSBI.
Billet #	A billet number associated with the person's security clearance.
Clearance #	The clearance number. This is used for printing a DoE Visit Request.
DSS	The DSS department/entity that approved the DCID.
Last Action	The last action taken for this clearance.
Granted By	The name of the agency that granted the clearance.
Granted	The date that the person's clearance was granted.
Investigated	The date of investigation associated with the basis of the clearance.
Reinvestigation Notification	The date for future reinvestigation of the clearance, before it will be administratively terminated.
Next Brief	The date the person is scheduled to receive another security clearance briefing.
Briefed	The date of the last briefing for the person's security clearance.
Rebriefed	The date that the clearance application was received by the clearance processing authority.
Debriefed	The date the person's clearance was debriefed. A date in this field effectively makes the clearance inactive.
DCID	The date of DCID (Director Central Intelligence Directive) approval.

Last Held	The date this clearance was last held.
Expires	The date this clearance is due to expire.
SF 312 Brief	The date for the SF 312 Brief date for this clearance.

Clearance Case Applications/Polygraph



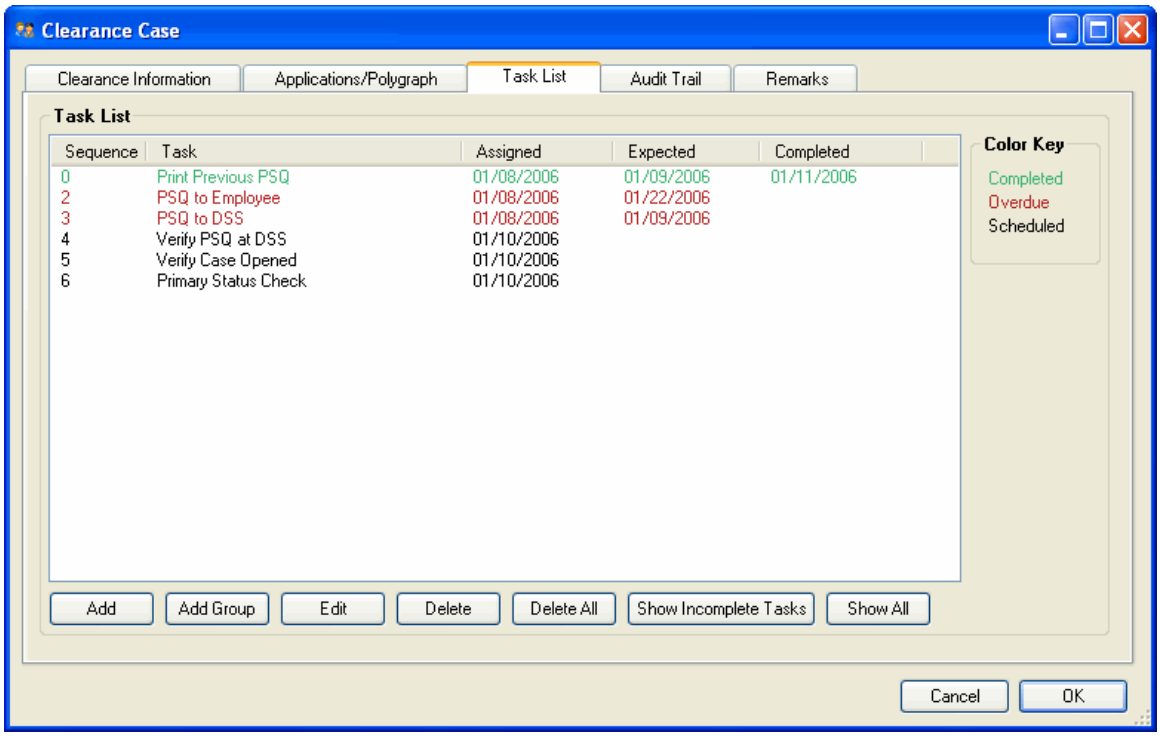
For more information about using this screen, see Input Screen.

Clearance Cases, Applications/Polygraph Page Fields

Field Name	Description
562 Submitted	If checked, indicates a Form 562 has been sent.
RRU Submitted	Check this box if a RRU was submittted.
PSQ App Pending	Check this box if an application for a new clearance (PSQ) is pending.
Clearance Waiver	Check this box if a clearance waiver is in effect.
PR Submitted	Check this box if a PR form has been submitted.
Basis	The basis for the other clearance investigation, such as SBI or SSBI.

Sent	The date the PSQ application was submitted.
Level	The requested clearance level.
e-QIP Case #	The case number for a Electronic Personnel Security Questionnaire application.
e-QIP Sent Date	The date the Electronic Personnel Security Questionnaire application was transmitted.
Mode	Select either Initial Clearance or Periodic Reinvestigation.
Submitted	The date the other application was sent.
Denied	The date the other application was denied.
Reviewer	The reviewer of the other application.
Received	The date the other application was received.
Terminated	The date the other application was terminated.
Pending Basis	The pending basis for the other clearance investigation
Other Application Pending	Select if any other non-DoD clearances, such as DoE, DoJ, CIA, FBI, etc.
Case #	The case number for the polygraph.
Type	The type of polygraph test performed: lifestyle, counterintelligence, etc.
Result	Information about the results of the polygraph.
Given By	The name of the person who performed the polygraph.
Test Date	The date the polygraph was performed.

Clearance Case Task List

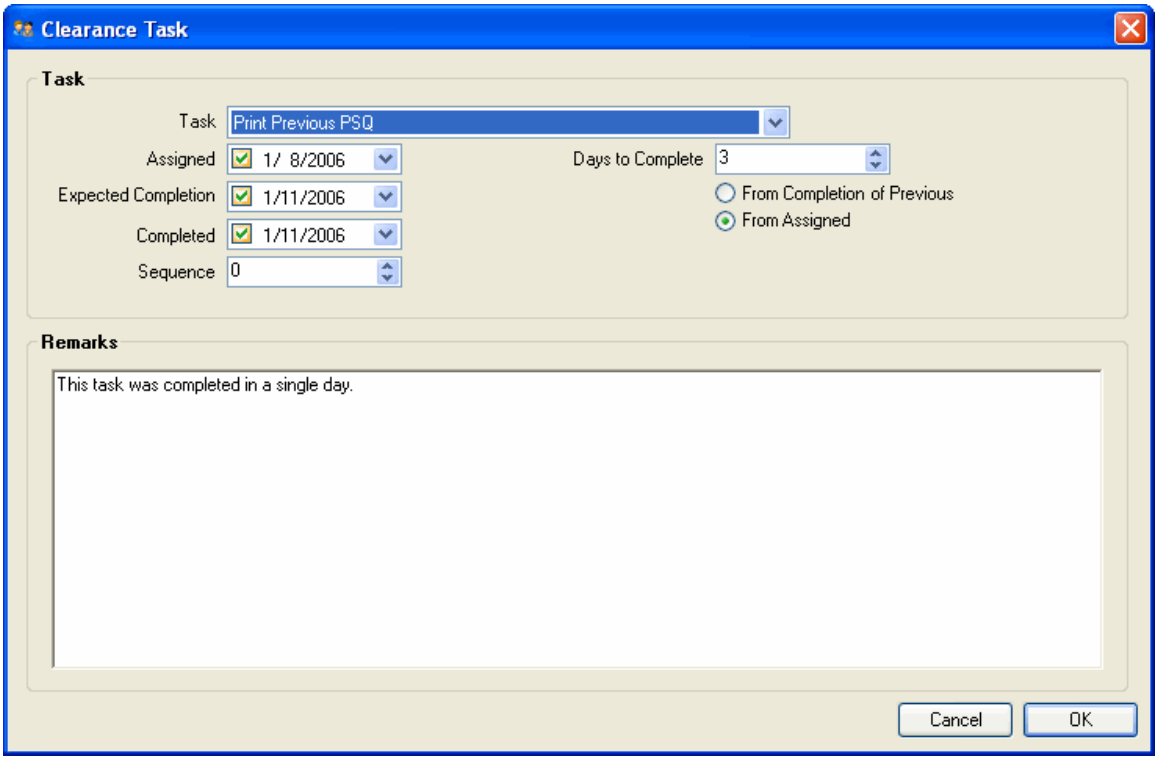


This screen shows a list of all tasks for this clearance. Click **Add Group** to add a group of tasks to a clearance. Tasks record the history of all activities required for securing and maintaining a clearance. For more information about using this screen, see Input Screen.

Clearance Cases, Task List Page Fields

Field Name	Description
Sequence	The sequence number for the task.
Assigned	The date the task was assigned.
Expected	The date the task is expected to be completed.
Completed	The actual completion date for the task.
Show Incomplete Tasks	Click to view only tasks that have not been completed.
Show All	Click to view all tasks, complete and incomplete.

Clearance Case Task List, Detail

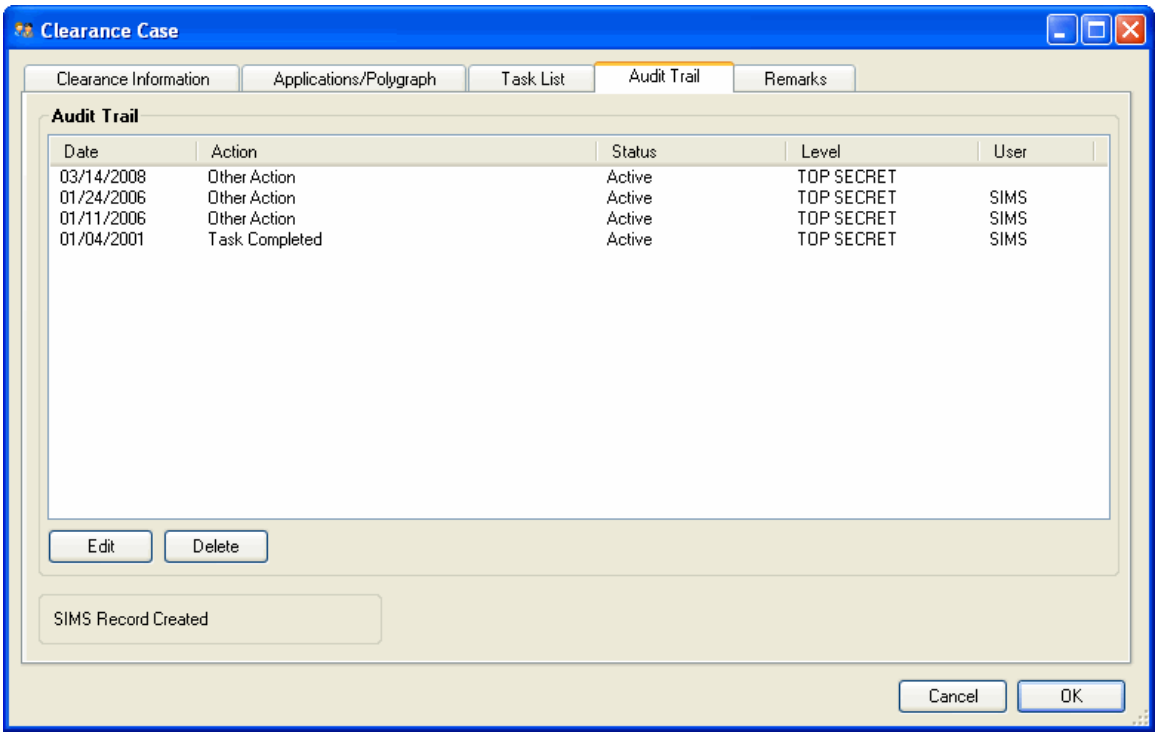


For more information about using this screen, see Input Screen.

Cleared Personnel, Clearances Task Page Fields

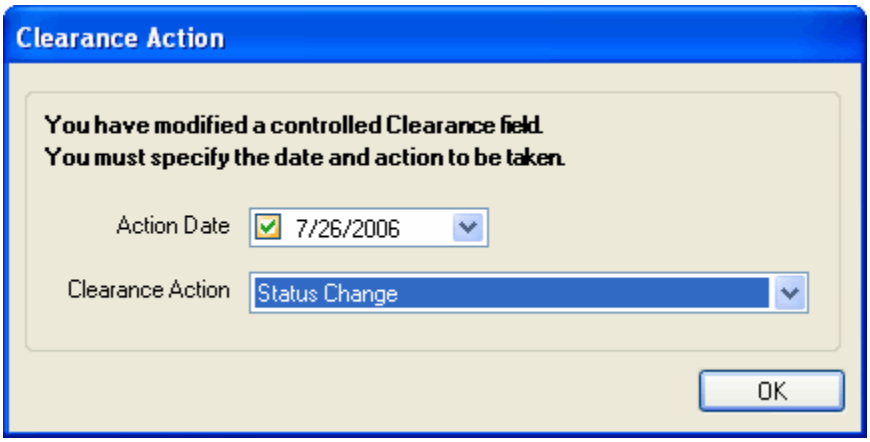
Field Name	Description
Task	The task or event for this clearance.
Assigned	The date the task was assigned.
Expected Completion	The date the task is expected to be completed. This date is calculated based upon the Assigned Date and Days to Complete field.
Completed	The actual completion date for the task.
Sequence	Enter the sequence number for this task.
Days to Complete	The number of days expected to complete the task. Select option to indicate if this is from the date assigned or from the completion of the previous task.
Remarks	Enter free-form textual information (up to 32kb).

Clearance Case Audit Trail



This screen shows an audit trail for this clearance held by the individual. If **Maintain an audit trail for clearances modifications** is turned on in System Customization, then each time a change is made to any of the clearance fields, a snapshot of all clearance fields is recorded in the audit trail.

When you save the personnel record after changing a clearance field, a dialog box confirms the change and asks you to enter an action for recording the change in the audit trail.
For example if you added a Debrief date, you would see a dialog box like this:



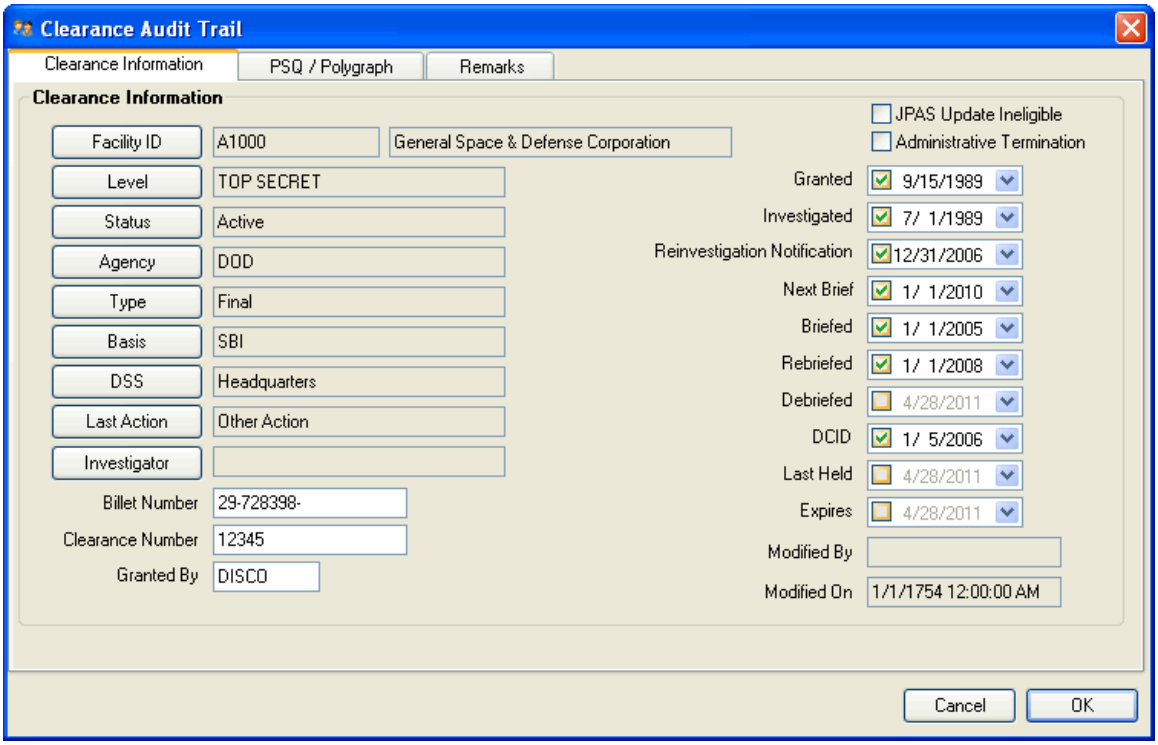
Click in the **Clearance Action** field to see a pick list of actions.
Clearance Cases, Audit Trail List Page Fields

Field Name	Description
Action	The type of modification that was made to a clearance field or fields.
Date	The date the clearance information was modified.

Status	The status of the clearance when the modification was made.
Level	The level of the clearance.

If the setting **Only Managers Can Edit Clearance Audit Trail** is not checked, all SIMS users will be able to edit Clearance Audit Trail records. If this setting is checked, only a SIMS Manager can edit Clearance Audit Trail records. A SIMS Manager can also run a report and manage audit trail changes by going to Utilities > Database Audit Trail.

Clearance Case Audit Trail, Detail



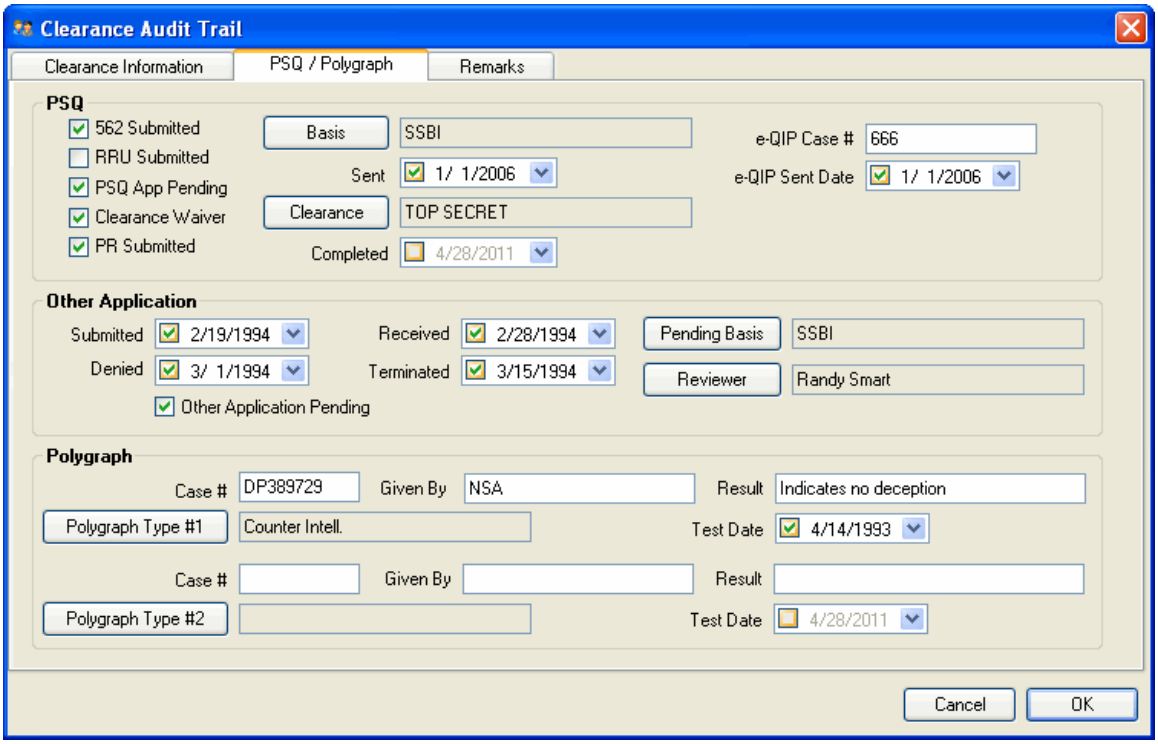
For more information about using this screen, see Input Screen.

Cleared Personnel, Clearance Audit Trail Clearance Information Page Fields

Field Name	Description
Facility ID	The facility identification number.
Level	The clearance level.
Status	The current status of the clearance (active, terminated, etc.)

Agency	The agency: DoD (Department of Defense), DoE (Department of Energy), or DoJ (Department of Justice).
Type	The clearance level type.
Basis	The basis for the clearance investigation, such as NAC, EBI, SBI, or SSBI.
DSS	The DSS department/entity that approved the DCID.
Last Action	The last action taken for this clearance.
Investigator	The investigator of the application.
Billet #	A billet number associated with the clearance type.
Clearance #	The clearance number. This is used for printing DoE Visit Requests.
Granted By	The name of the agency that granted the clearance.
JPAS Update Ineligible	If checked, this clearance record will not be eligible when doing a JPAS update.
Administrative Termination	Signifies the clearance was administratively terminated.
Granted	The date the clearance was granted.
Investigated	The date the facility was investigated.
Reinvestigation Notification	The date for future investigation of the clearance.
Next Brief	The date of the facility's next briefing.
Briefed	The date of the last briefing for the security clearance.
Rebriefed	The date that the clearance application was received by the clearance processing authority.
Debriefed	The date the clearance was debriefed. A date in this field effectively makes the clearance inactive.
DCID	The date of DCID (Director of Central Intelligence Directive) approval.
Last Held	The date this clearance was last held.

Expires	The date the clearance is due to expire.
Modified By	The user name in which the clearance record was modified.
Modified On	The date/time of the last action.

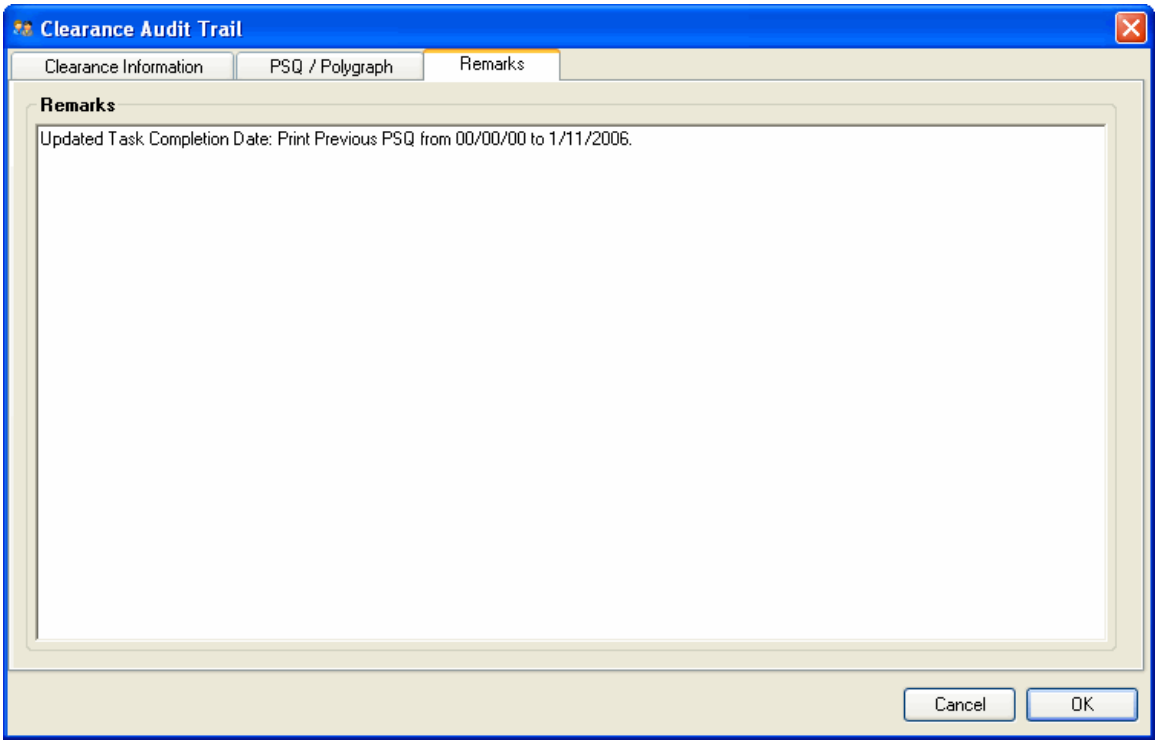


For more information about using this screen, see Input Screen.

Cleared Personnel, Clearance Audit Trail PSQ/Polygraph Page Fields

Field Name	Description
562 Submitted	If checked, indicates a Form 562 has been sent.
RRU Submitted	If checked, RRU was submitted.
PSQ App Pending	Select this box if an application for a new clearance (PSQ) is pending.
Clearance Waiver	Select this box if a clearance waiver is in effect.
PR Submitted	Select this box of a PR form has been submitted.
Basis	The basis for the other clearance investigation (such as SBI, or SSBI).

Sent	The date the PSQ was submitted.
Clearance	The requested clearance level.
Completed	The completion date for the clearance level.
EPSQ Case #	The case number for an Electronic Personnel Security Questionnaire application.
EPSQ Sent Date	The date the Electronic Personnel Security Questionnaire application was transmitted.
Submitted	The date the other application was sent.
Denied	The date the other application was denied.
Reviewer	The reviewer of the other application.
Received	The date the other application was received.
Terminated	The date the other application was terminated.
Other Application Pending	Any other non-DoD clearances, such as DoE, DoJ, CIA, FBI, etc.
Case #	The case number for the polygraph.
Type	The type of polygraph test performed: lifestyle, counterintelligence, etc.
Result	Information about the results of the polygraph.
Given By	The name of the person who performed the polygraph.
Test Date	The date the polygraph was performed.

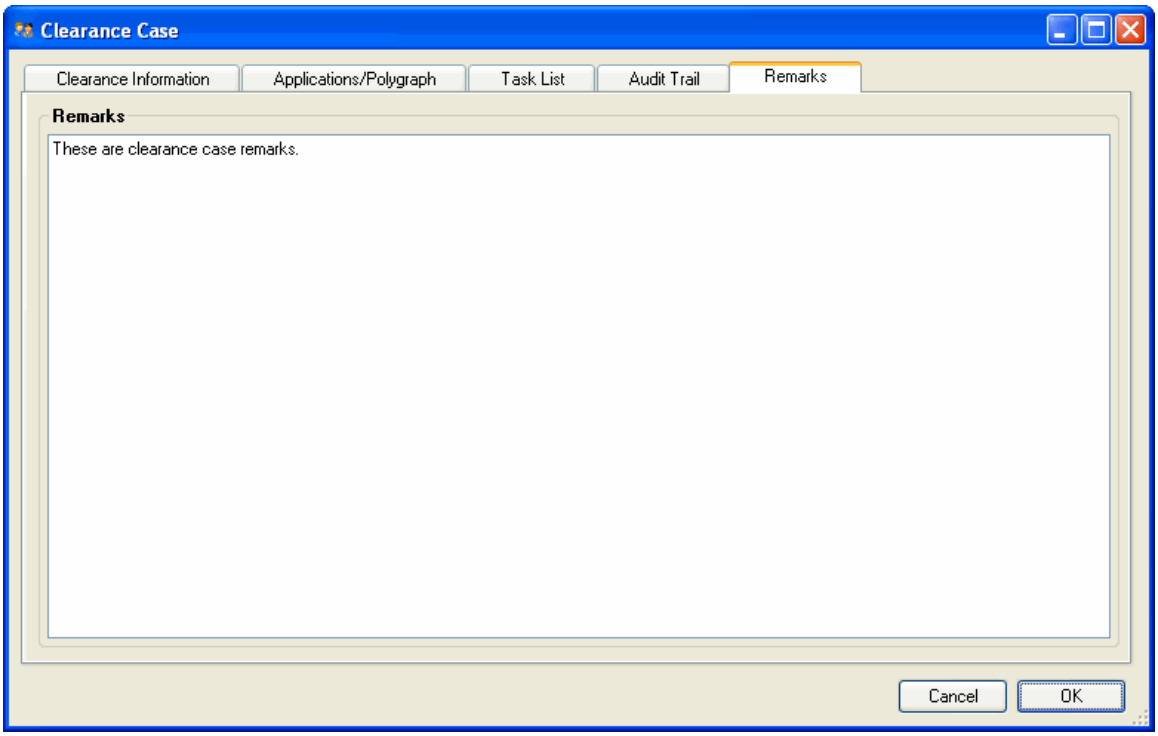


For more information about using this screen, see Input Screen.

Cleared Personnel, Clearance Audit Trail Remarks Page Fields

Field Name	Description
Remarks	Enter free-form textual information (up to 32kb).

Clearance Case Remarks



For more information about using this screen, see Input Screen.

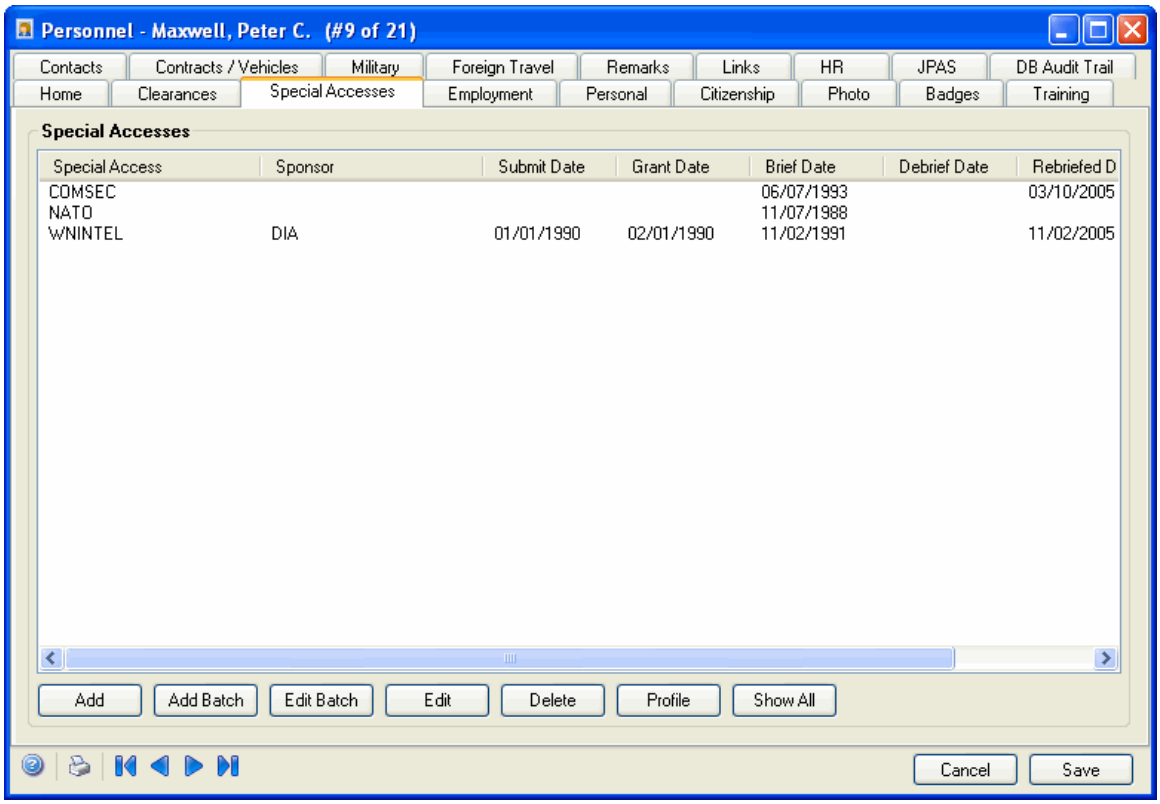
Clearance Cases, Audit Trail Input, Remarks Page Fields

Field Name	Description
Remarks	Enter free-form textual information (up to 32k bytes of text).

Cleared Personnel Special Accesses

Cleared Personnel Special Accesses

This screen lists all special accesses held by the individual.



For more information about using this screen, see Input Screen.

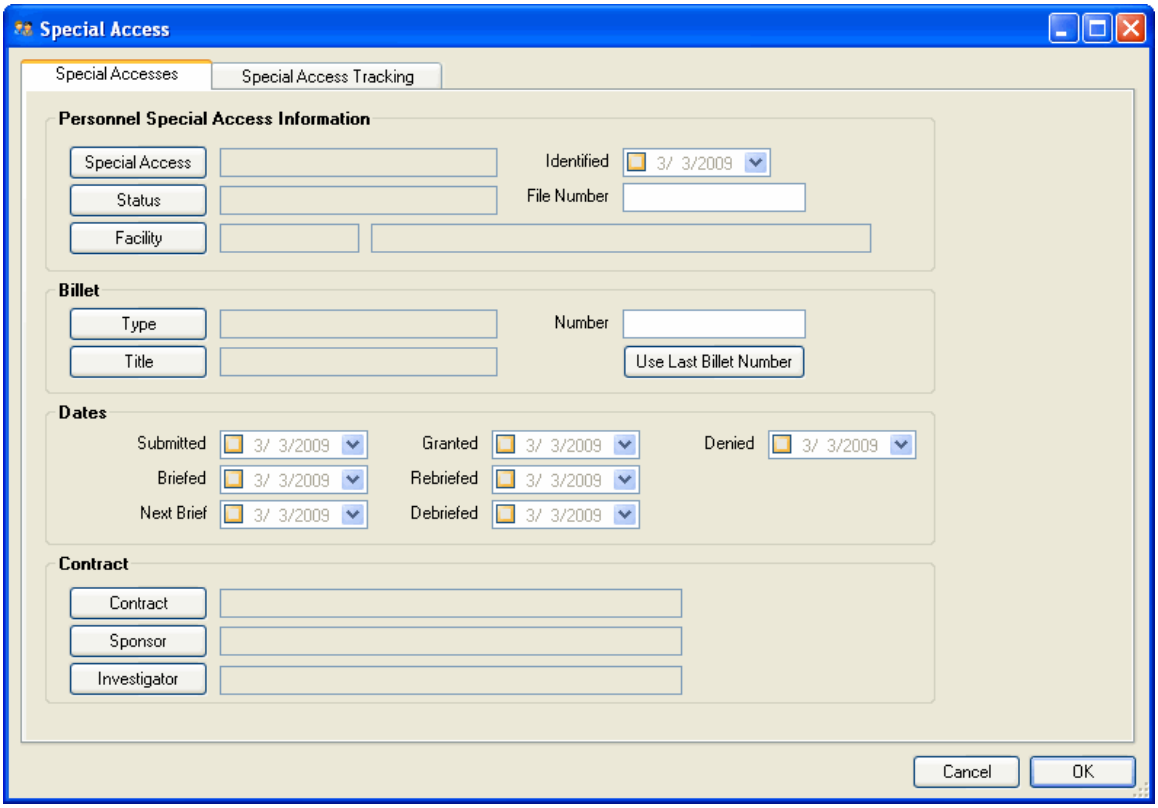
Cleared Personnel, Special Accesses Page Fields

Field Name	Description
Special Access	Lists any special accesses the person holds. Validations can be turned on/off by going to the Personnel System Customization settings. If the Special Access requires a briefing (Personnel type > Briefing Required is checked) in the Special Access Definitions dialog, the special access will appear gray and italicized in this screen if a brief date has not been set. Note that in the System Customization Personnel settings tab, there is a setting and when checked, this screen will show only those Special Accesses that have a briefing, are not debriefed, or denied. When opening the record, the Show All button here would over ride that setting and show all Special Accesses, regardless of whether or not it requires a briefing status.
Sponsor	The contract sponsor.
Submit Date	The date the application for the special access was submitted.
Grant Date	The date the special access was granted.

Brief Date	The date the person was originally briefed for the special access.
Debrief Date	The date the person was debriefed for the special access. This effectively makes the special access inactive.
Rebriefed Date	The date the person was last re-briefed for the special access.
Denied Date	The date of denial for the special access.
Add Batch	Click this button to add several special accesses at once. The access must have the same dates and other attributes.
Edit Batch	Click this button to perform a batch update to any number of special accesses for a single personnel record.
Profile	Click this button to view a report of all special accesses and other clearances for the individual. This report can also be viewed and printed by going to the Reports Security Profile menu option.

Special Accesses

This page appears when you click **Add** or **Edit** on the Cleared Personnel, Special Accesses page.



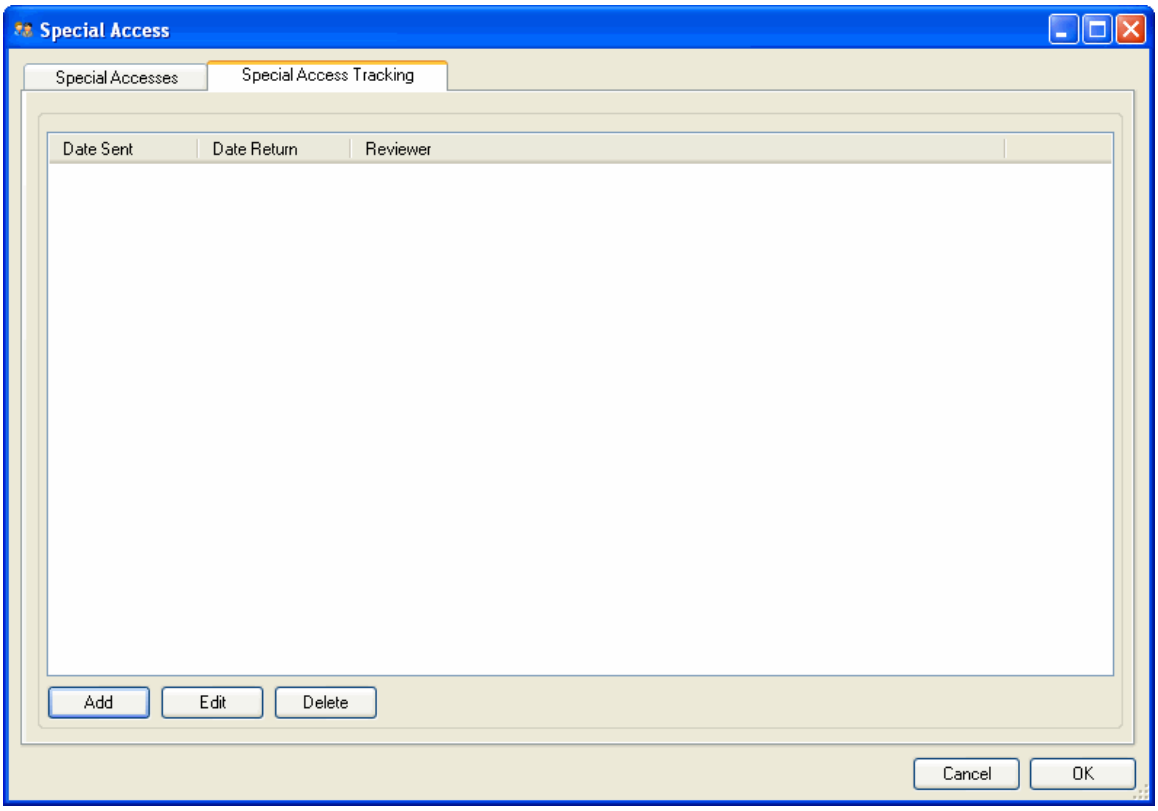
For more information about using this screen, see Input Screen.

Special Access, Special Accesses Page Fields

Field Name	Description
Special Access	Click this button to select the special access. Refer to the Special Access Definitions topic for information on how the Special Accesses are defined in this pick list.
Status	The status of the special access.
Facility	Click this button to select the facility for the special access.
Identified	The date of the special access.
(Billet) Number	The billet number.
Type	The billet type.
Title	The billet title.
(Dates) Submitted	The date the special access request was submitted.
Briefed	The date the person was last briefed.

Next Brief	The date when the person is next scheduled to be briefed.
Granted	The date the special access was granted.
Rebriefed	The date when the person was re-briefed for the special access.
Debriefed	The date the person was last debriefed for this special access.
Denied	The date the special access application was denied.
Contract	Click this button to select the contract for the special access.
Sponsor	The contract sponsor.
Investigator	The contract investigator.

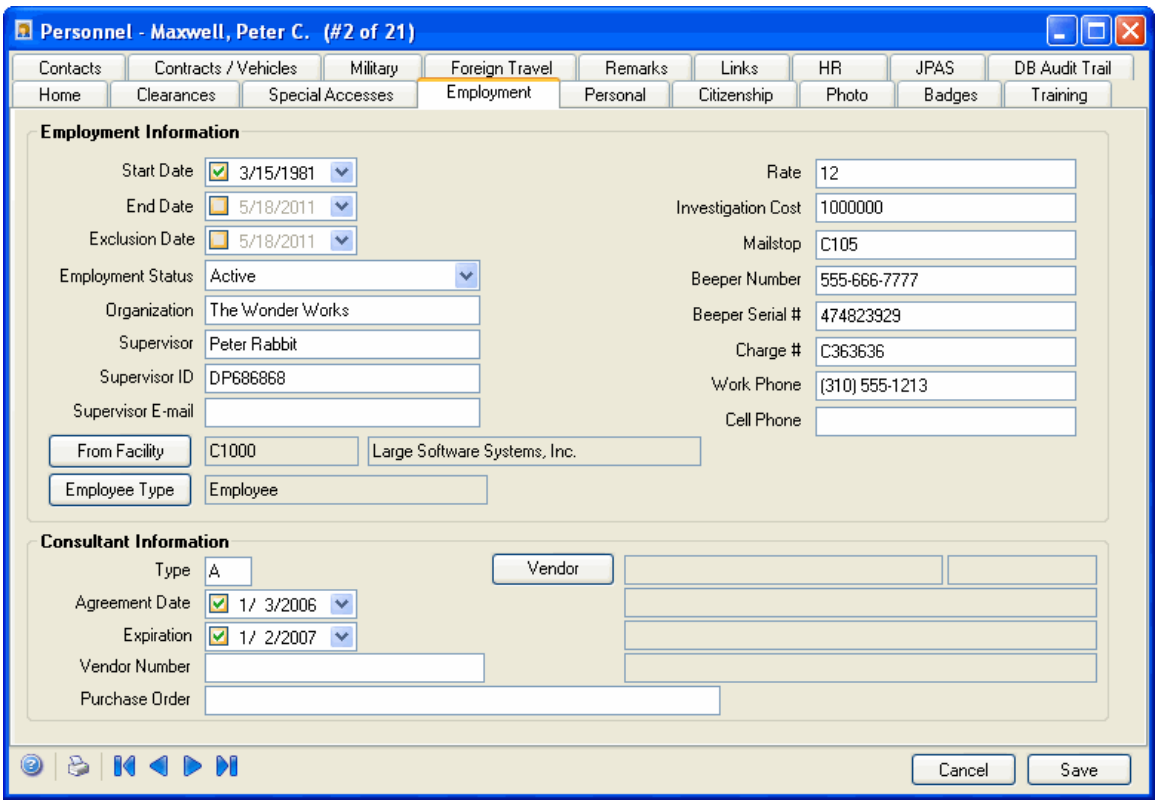
Special Access Tracking



For more information about using this screen, see Input Screen.
Special Accesses, Special Access Tracking Page Fields

Field Name	Description
Date Sent	The date the special access application was sent.
Date Return	The date the special access decision was returned.
Reviewer	The name of the person who reviewed the special access application.

Cleared Personnel Employment



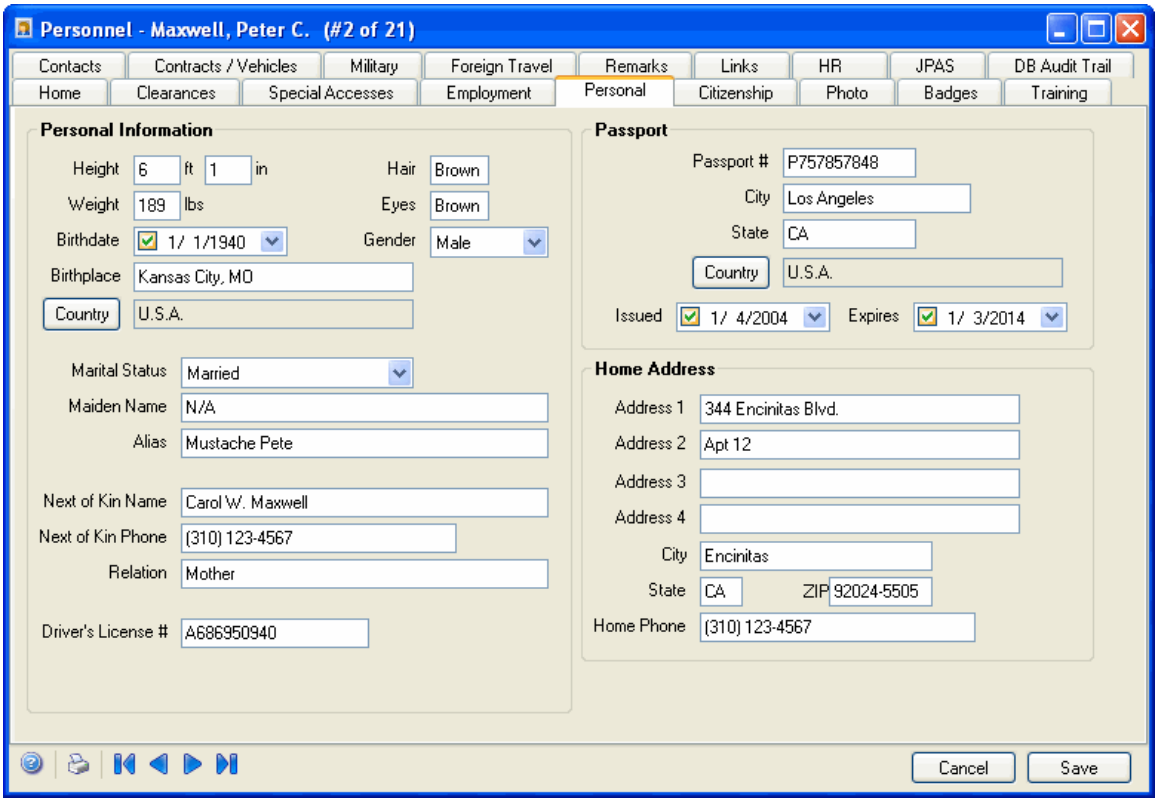
For more information about using this screen, see Input Screen.

Cleared Personnel, Employment Page Fields

Field Name	Description
Start Date	The person's employment start date.
End Date	The person's employment termination date. If checked, the Terminated checkbox on the Personnel home page will get checked.
Exclusion Date	The Exclusion Date is used when printing the Key Management Personnel report.

From Facility	The ID and facility name for the person's From Facility record. Click **From Facility** to show the Facility Record Picker.
Employment Status	The person's employment status.
Organization	Any group or organization a person belongs to that cannot be classified as "department." A field for department is on the home tab.
Work Phone	The person's work telephone number.
Supervisor	The name of the person's supervisor.
Supervisor ID	The identification number of the persons supervisor.
Supervisor E-mail	The e-mail of the person's supervisor.
Employee Type	The person's employee type.
Rate	The person's accounting charge (billing) rate.
Investigation Cost	The amount of the cost for the investigation.
Mailstop	Internal mail stop address.
Beeper Number	Beeper phone number.
Beeper Serial #	Beeper serial number.
Cell Phone	The person's cell phone number.
Charge #	The person's accounting charge number.
Consultant Type	The type of consultant.
Agreement Date	The date of agreement for the consultant.
Expiration	The date the agreement with the consultant expires.
Vendor Number	The vendor number.
Vendor	Select the Vendor using the Facility Record Picker.
Purchase Order	The purchase order information.

Cleared Personnel Personal



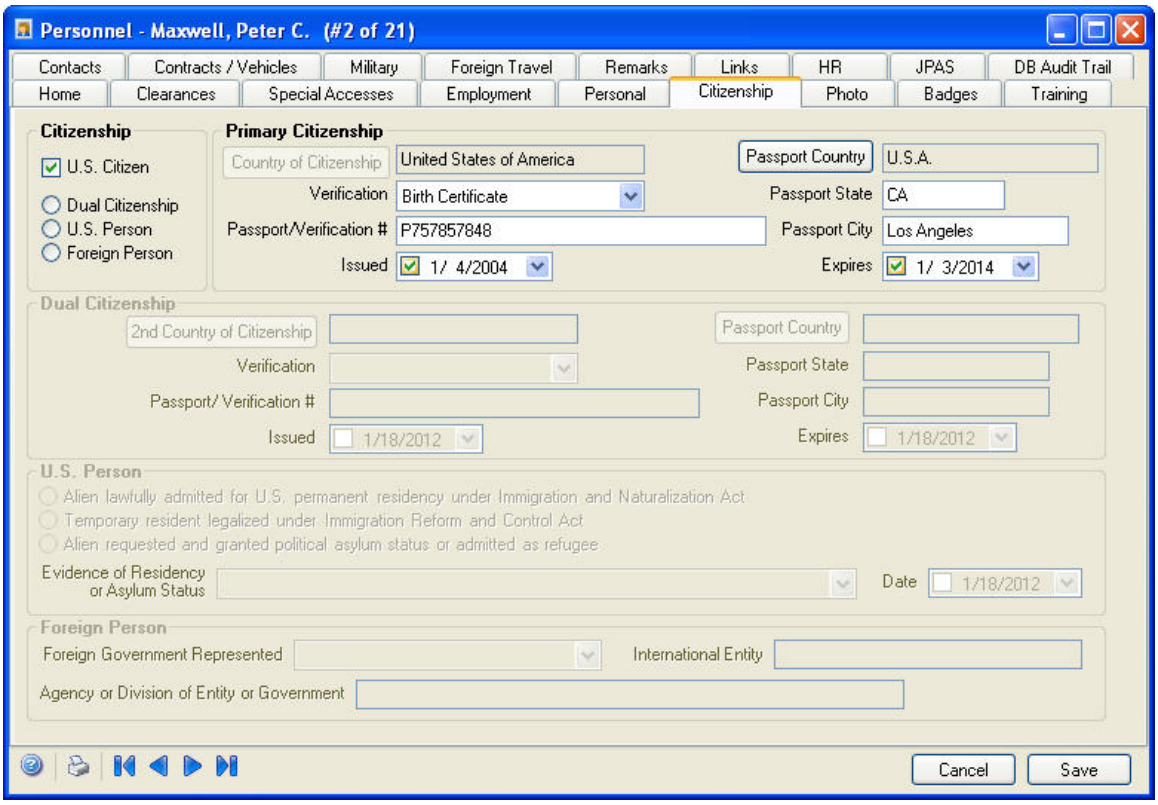
For more information about using this screen, see Input Screen.

Cleared Personnel, Personal Page Fields

Field Name	Description
Height	The height of the person in feet and inches.
Weight	The weight of the person in pounds.
Birthdate	The person's date of birth.
Birthplace	The person's place of birth (city and state).
Country	Select the person's country of birth from the option menu.
Hair	The hair color of the person.
Eyes	The eye color of the person.
Gender	Male or Female.
Marital Status	Select the person's marital status from the option menu.

Maiden Name	The person's maiden name, if applicable.
Alias	An alternate name that the person may be known by.
Next of Kin	The name of the next of kin to be contacted in case of an emergency.
Next of Kin Phone	The telephone phone number of the next of kin named.
Relation	The person's relation the next of kin named.
Driver's License #	The person's driver's license number.
Passport #	The person's passport number.
City	The passport issuing city.
State	The passport issuing state.
Country	The passport issuing country.
Issued	The date the passport was issued. Select the check box to modify the date.
Expires	The date the passport expires. Select the check box to modify the date.
Address 1	The home street address.
Address 2	The home street address if more than one line.
City	The home city.
State	The home state.
Zip	The home zip code.
Home Phone	The person's home telephone number.

Cleared Personnel Citizenship



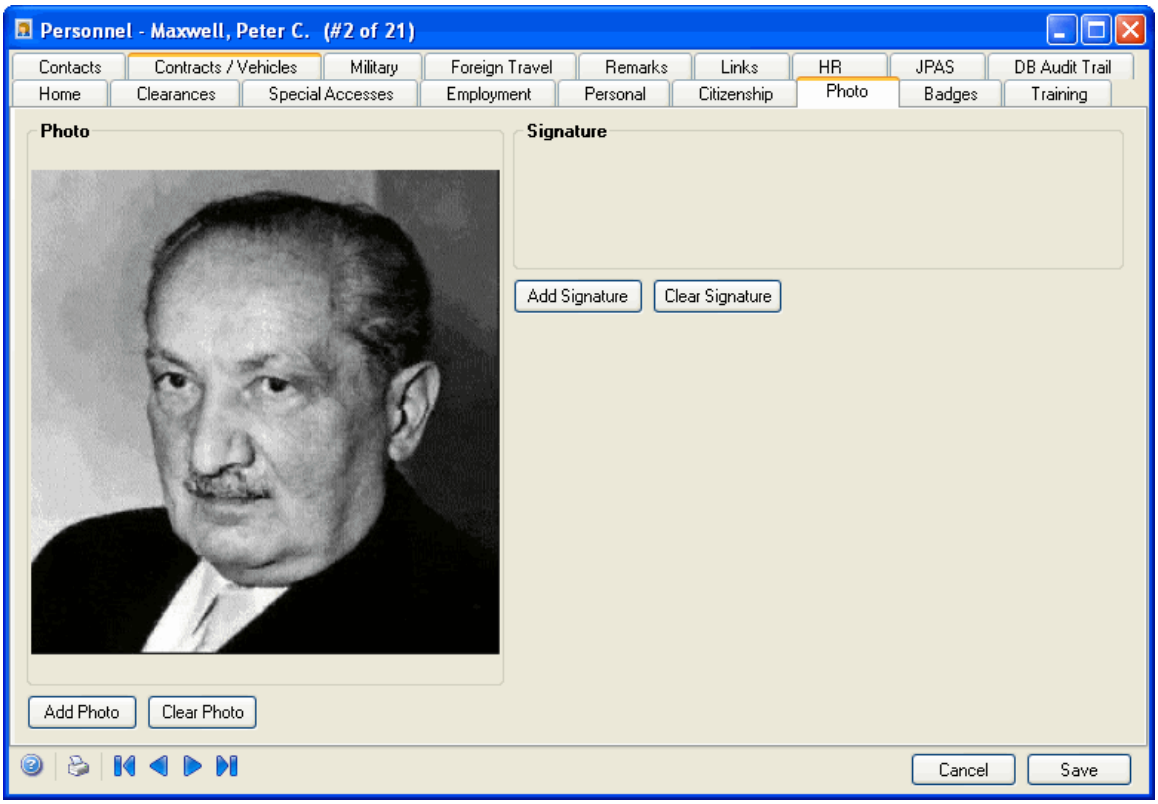
For more information about using this screen, see Input Screen.

Cleared Personnel, Citizenship Page Fields

Field Name	Description
U.S. Citizen	If the person is a U.S. citizen, check this box.
Dual Citizenship, US Person, Foreign Person	If the person is not a U.S. citizen, select the applicable type of citizenship. If you select one of these options, additional fields will become available.
Country of Citizenship	The country of citizenship.
Verification	The form of verification for the country of citizenship.
Passport #	The person's passport number.
Issued	The date the passport was issued. Select the check box to modify the date.
Passport Country	The country that issued the passport.
Passport State	The state that issued the passport.
Passport City	The city that issued the passport.
Expires	The date the passport will expire.

2nd Country of Citizenship	The second country of citizenship of a dual citizenship, if applicable.
Verification	The form of verification for the country of dual citizenship.
Passport #	The person's passport number for the country of dual citizenship.
Issued	The date the passport was issued from the country of dual citizenship. Select the check box to modify the date.
Passport Country	The country that issued the passport for dual citizenship.
Passport State	The state that issued the passport for dual citizenship.
Passport City	The city that issued the passport for dual citizenship.
Expires	The date the passport will expire for dual citizenship.
U.S. Person	If the person is an alien, indicate the method in which they legally reside in the U.S. as either a permanent resident, temporary resident, or granted political asylum.
Evidence of Residency or Asylum Status	Indicate the evidence of the persons residency or asylum status.
Date	Indicate the date in which residency or asylum status was given. Select the check box to modify the date.
Foreign Government Represented	If the person represents a foreign government, select that government from the option menu.
International Entity Represented	If the person represents an international entity, specify.
Agency or Division of Entity or Government	Specify the agency, entity, or government that the foreign person represents.

Cleared Personnel Photo/Signature

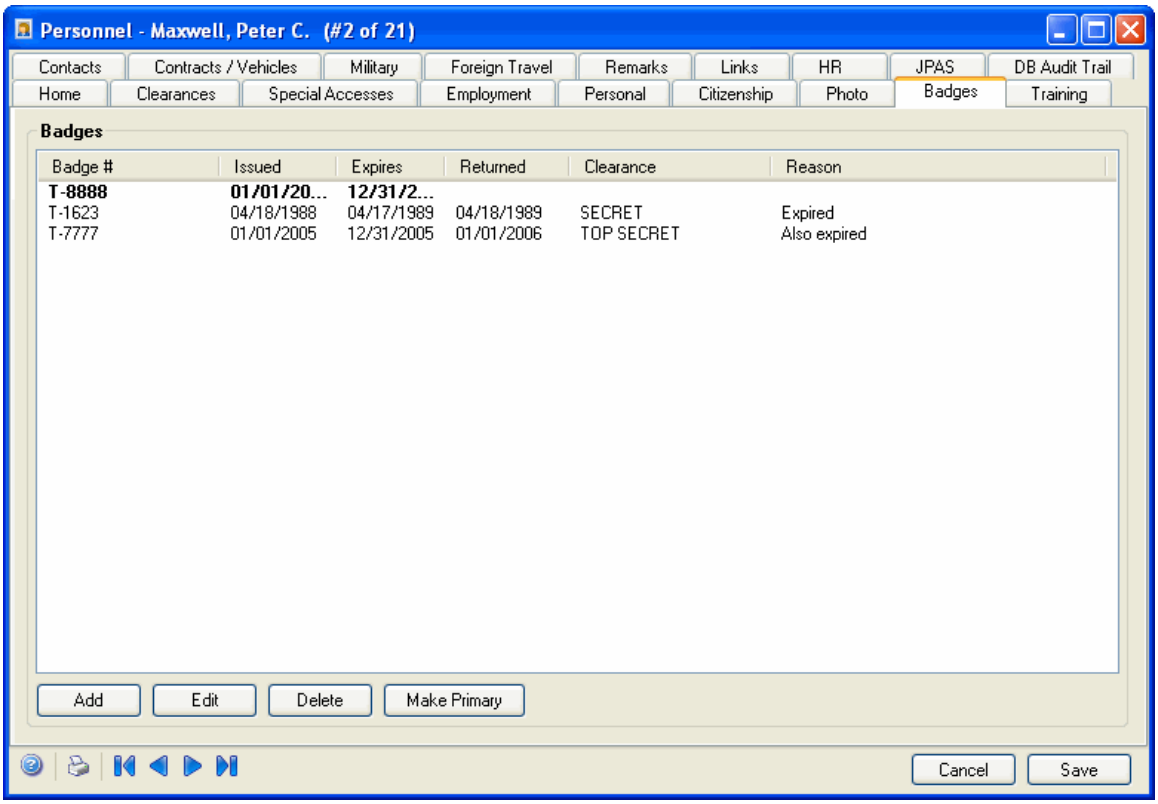


For more information about using this screen, see Input Screen.

Cleared Personnel, Photo, Signature Page Fields

Field Name	Description
Add Signature	Select to add the person's scanned, handwritten signature from another application. The signature can be used for printing or faxing outgoing visit requests. The maximum file size can be changed in Utilities > System Customization > Maximum Image size. The file size maximum is set at 1000 kb. However, the maximum size can set up to 10000 kb.
Clear Signature	Select to remove the displayed signature.
Add Photo	Select to add the person's scanned or digital photograph from another application. The maximum file size can be changed in Utilities > System Customization > Maximum Image size. The file size maximum is set at 1000 kb. However, the maximum size can be up to 10000 kb.
Clear Photo	Select to remove the displayed photo.

Cleared Personnel Badges



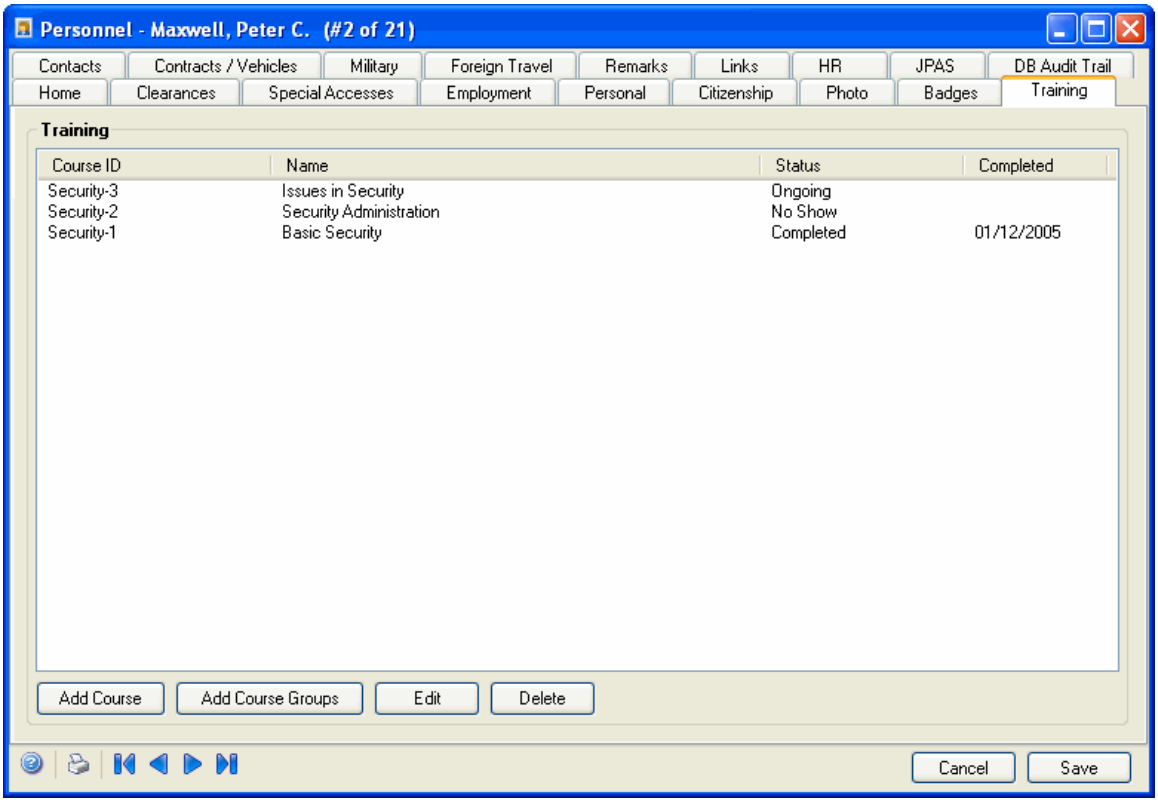
For more information about using this screen, see Input Screen.

Cleared Personnel, Badges Page Fields

Field Name	Description
Badge #	The person's employment badge number.
Issued	The date the current badge was issued to the person.
Expires	The date the current badge expires.
Returned	The date the person's badge was returned to security or Human Resources.
Clearance	The clearance that is on the badge.
Reason	The reason the badge was returned, such as termination of employment.
Make Primary	Select to indicate that the selected badge is the person's primary badge. The primary badge is displayed in **bold**.

Cleared Personnel Training

This screen shows a list of all training courses scheduled or previously attended by the individual.



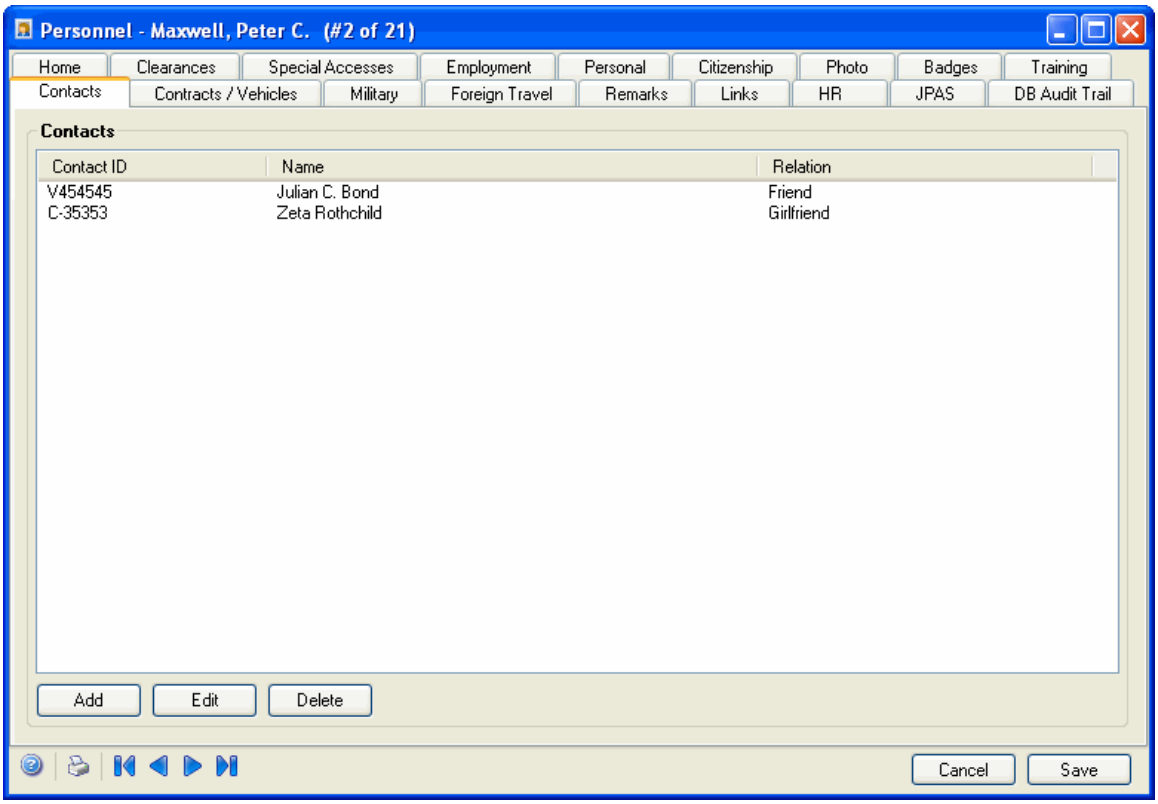
For more information about using this screen, see Input Screen.

Cleared Personnel, Training Page Fields

Field Name	Description
Course ID	Course number or ID.
Name	Course name.
Status	The status of the course, such as ongoing or completed.
Completed	The date the person finished the course.
Add Course	Click this button to add a course.
Add Course Groups	Click this button to add a course group.

Cleared Personnel Contacts

This screen lists people that are contacts for the person, such as next of kin.



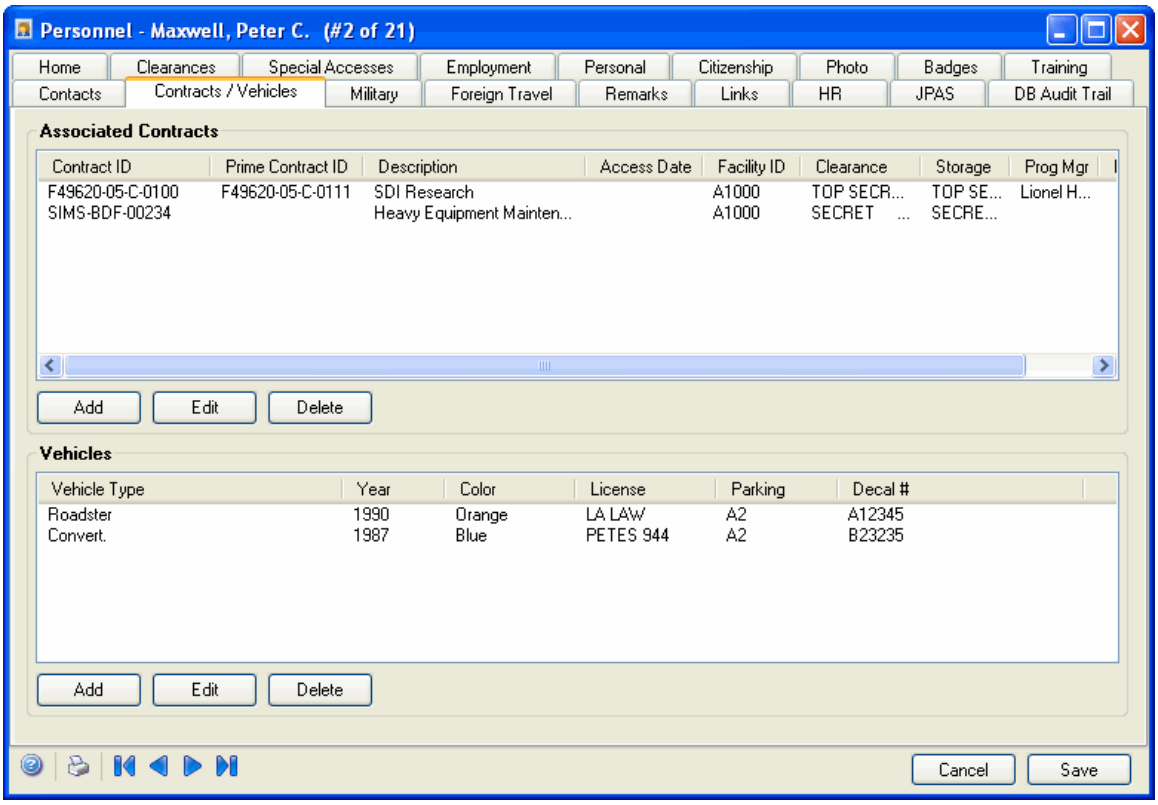
For more information about using this screen, see Input Screen.

Cleared Personnel, Contacts Page Fields

Field Name	Description
Contact ID	Identification label of the contact.
Name	The name of the contact.
Relation	The relationship of the contact to the person.

Cleared Personnel Contracts/Vehicles

The Associated Contracts list displays contracts assigned to the person's record. The vehicles screen lists a person's vehicles for parking purposes.



For more information about using this screen, see Input Screen.

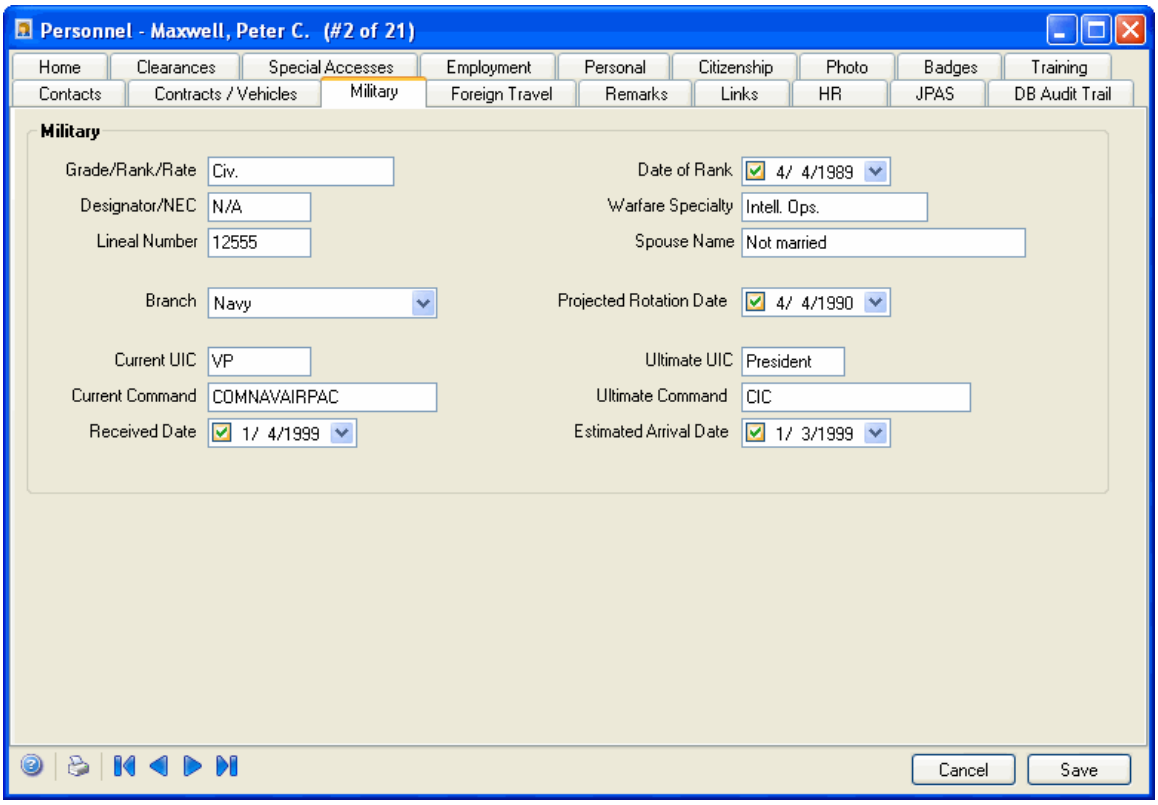
Cleared Personnel, Contracts/Vehicles Page Fields

Field Name	Description
Contract ID	The contract number ID associated with the person.
Prime Contract ID	The prime contract number ID which is used if this contract is a sub-contract.
Description	A brief description of the contract.
Access Date	The date the individual was granted access to the contract.
Facility ID	The contract's facility ID.
Clearance	The required contractor facility clearance level.
Storage	The required level of contractor safeguarding.
Prog Mgr	The Program Manager's name if this is a subcontract, or the ACO's name if it is a prime contract.
End Date	End date for the contract.

Vehicle Type	The manufacturer of the person's vehicle.
Year	The year the vehicle was manufactured.
Color	The color of the vehicle.
License	The vehicle's license plate number.
Parking	The vehicle's authorized parking location.
Decal #	The parking sticker number.

Cleared Personnel Military

If this person is currently in the military their specified military information is contained and/or entered in this screen.



For more information about using this screen, see Input Screen.

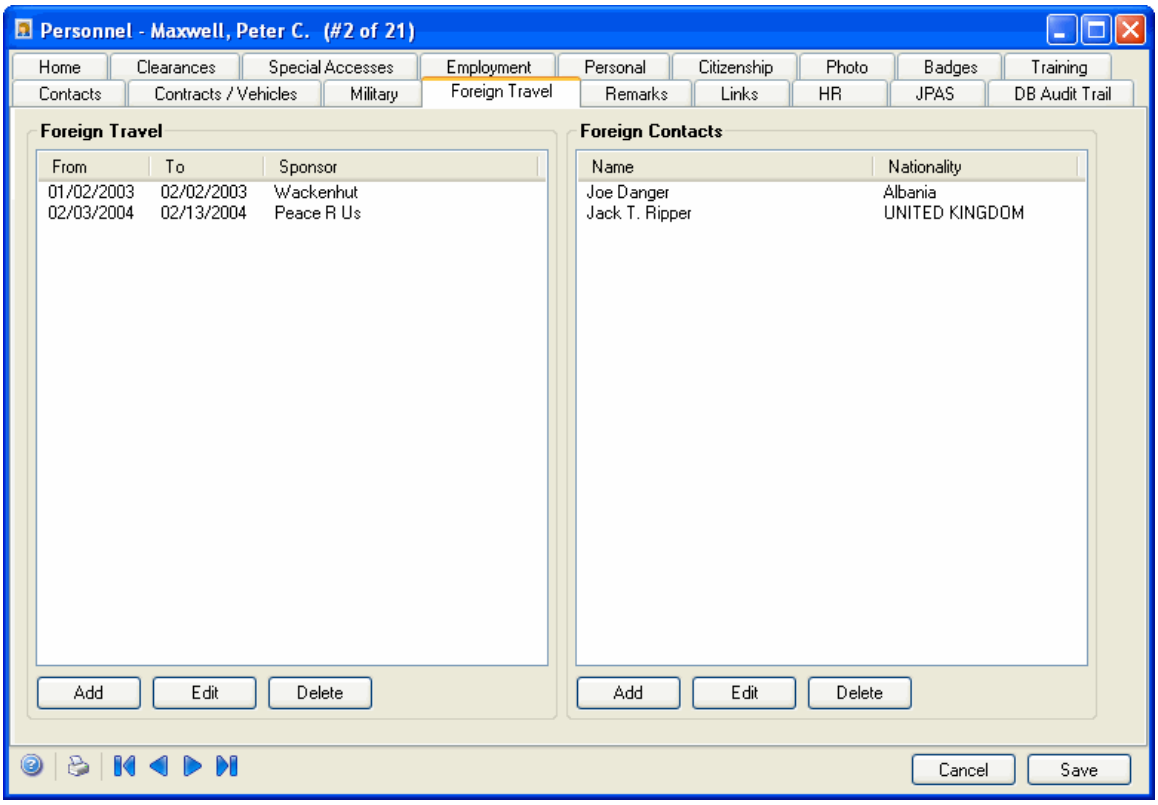
Cleared Personnel, Military Page Fields

Field Name	Description
Grade/Rank/Rate	The person's military grade, rank, or rate.
Designator/NEC	The person's designator or NEC.

Lineal Number	The person's lineal number in the military.
Date of Rank	The date their current rank was awarded.
Warfare Specialty	Their area of specialty in warfare.
Spouse Name	The name of the person's spouse, if any.
Branch	The branch of the military in which the person is enrolled.
Projected Rotation Date	The scheduled date of their next rotation.
Current UIC	Current unit identification code (UIC).
Current Command	Their current command.
Received Date	The date that the person entered their current unit.
Ultimate UIC	The unit identification code of the next projected unit.
Ultimate Command	The command of the next projected unit.
Estimated Arrival Date	The estimated date of arrival in the next projected unit.

Cleared Personnel Foreign Travel/Contacts

If the person has traveled outside of the U.S., then record any foreign travel and foreign contact in this screen, as required by the NISPOM.

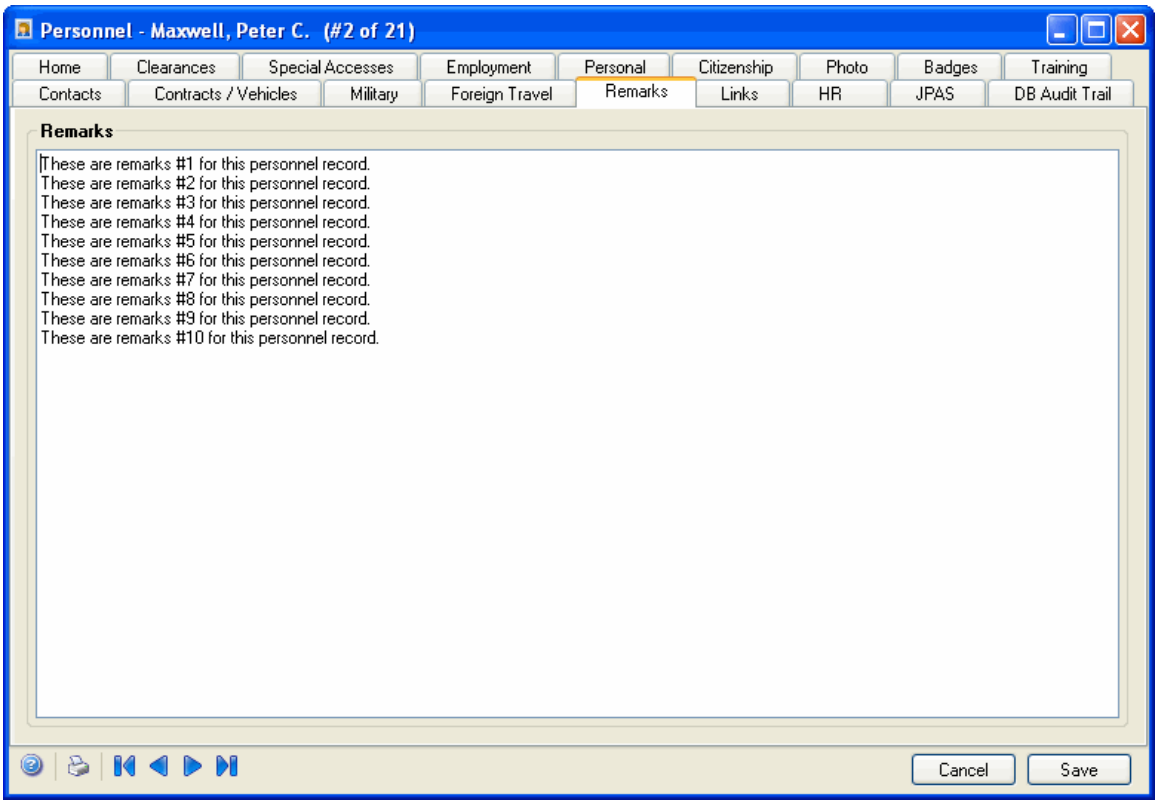


For more information about using this screen, see Input Screen.

Cleared Personnel, Foreign Travel/Contacts Page Fields

Field Name	Description
(Foreign Travel) From	The person's initial location.
To	The person's planned destination at the end of that leg of the journey.
Sponsor	The sponsor for the trip.
(Foreign Contacts) Name	The full name of a point of contact for the person, in the foreign country.
Nationality	The nationality of the point of contact.

Cleared Personnel Remarks

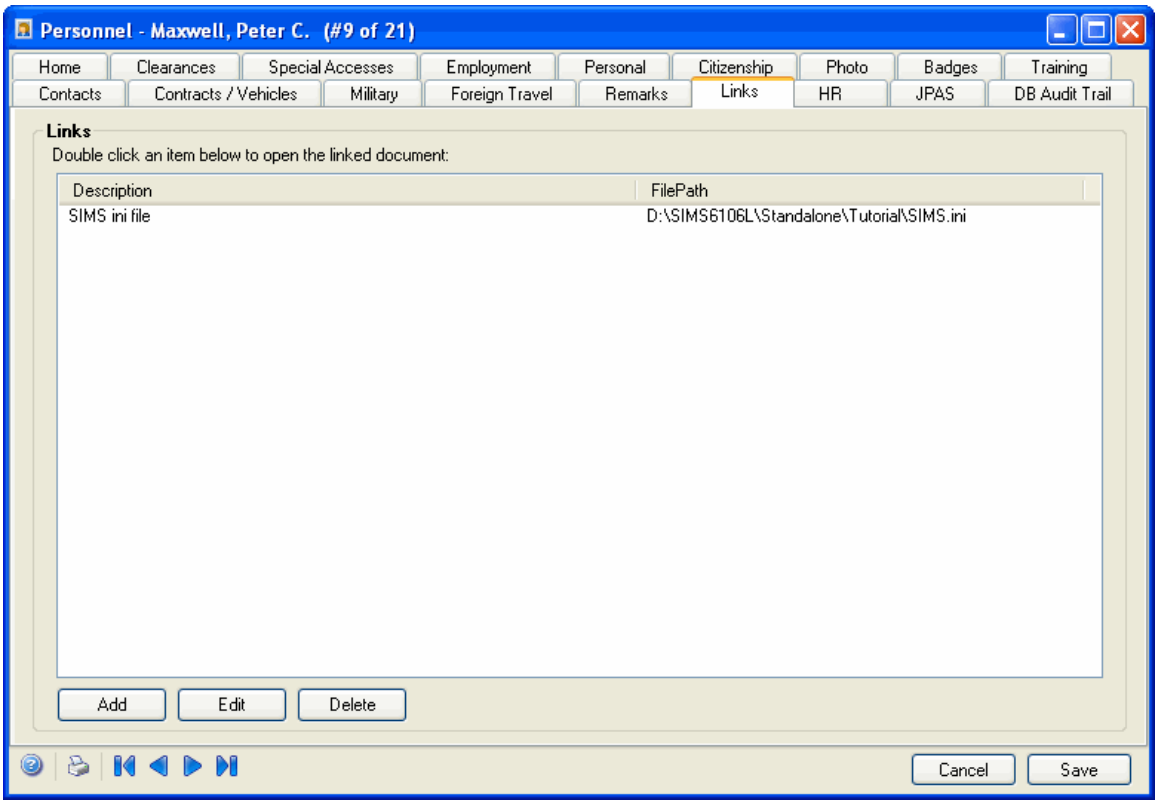


For more information about using this screen, see Input Screen.

Cleared Personnel, Remarks Page Fields

Field Name	Description
Remarks	Enter free-form textual information (up to 32k bytes of text).

Cleared Personnel Links



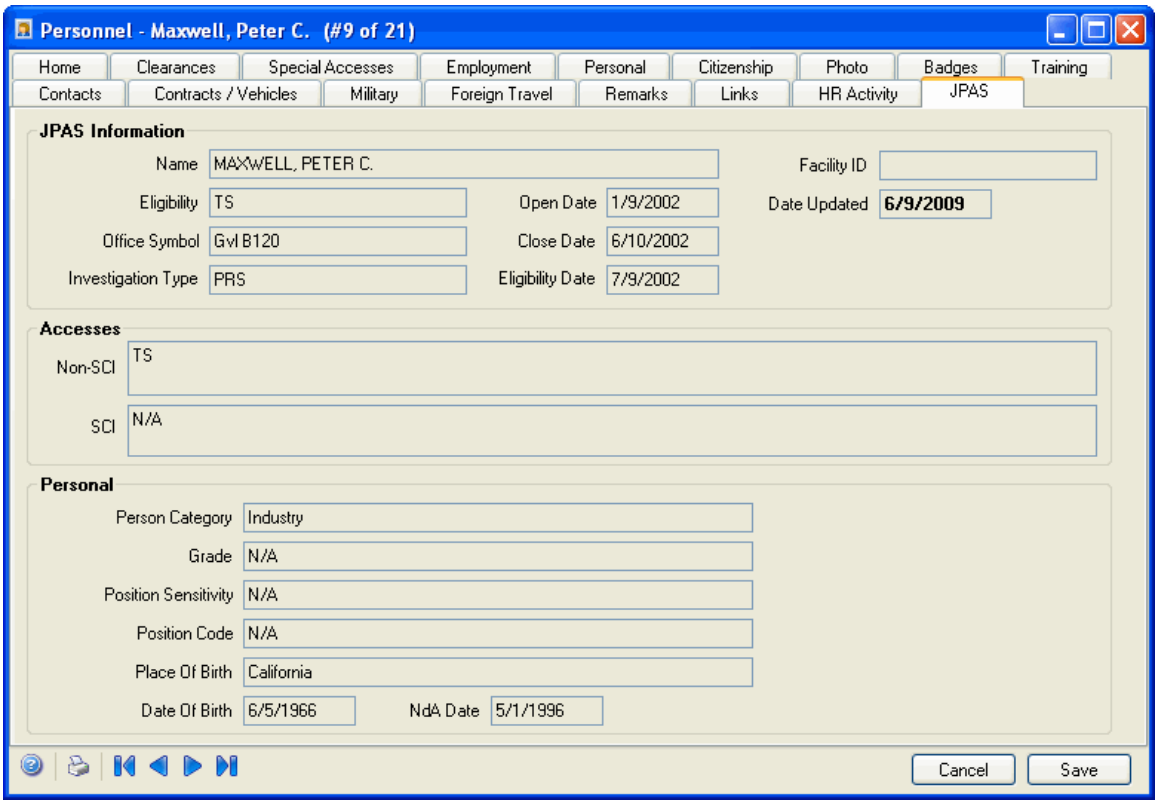
For more information about using this screen, see Input Screen.

Cleared Personnel, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Cleared Personnel JPAS

For information on how to perform a JPAS import, refer to the topic on JPAS Import under the Cleared Personnel Transactions topic.



For more information about using this screen, see Input Screen.

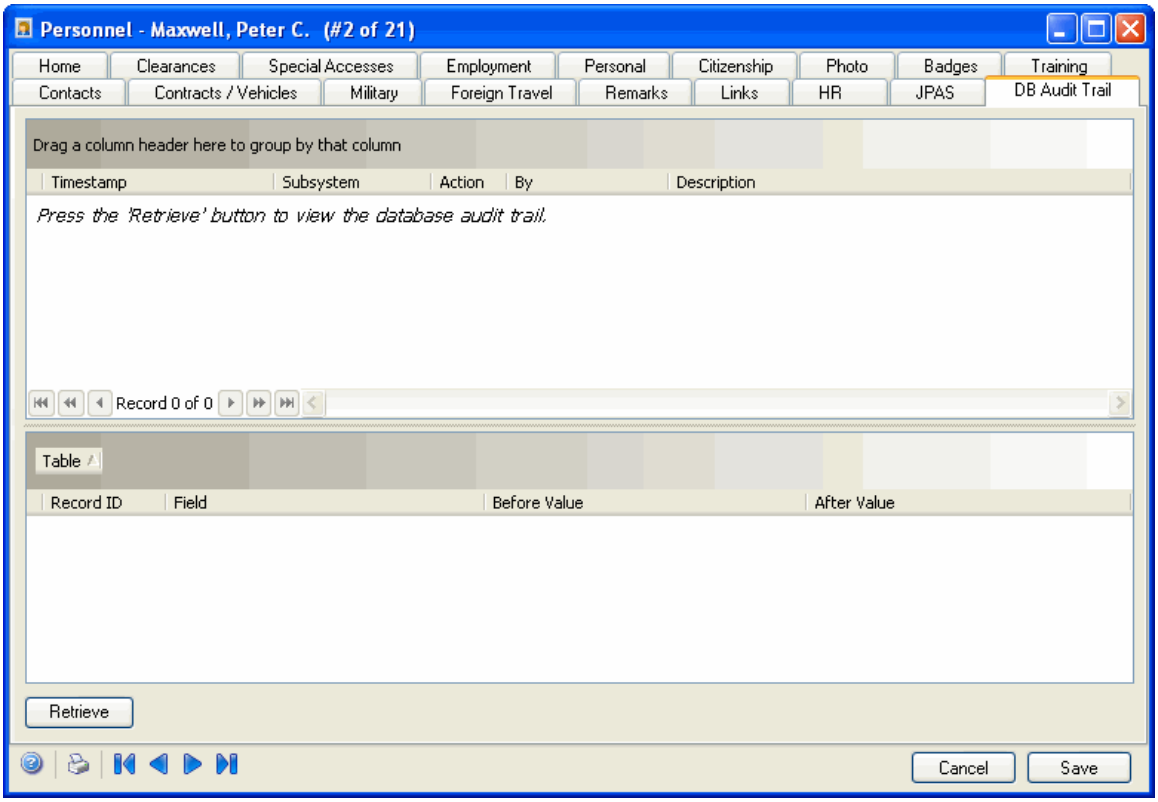
Cleared Personnel, JPAS Page Fields

Field Name	Description
Name	The person's full name.
Date Updated	The date the JPAS information was imported from the JPAS generated spreadsheet file.
Eligibility	The JPAS Eligibility.
Office Symbol	The JPAS Office Symbol.
Investigation Type	The JPAS Eligibility Investigation Type.
Open Date	The JPAS Eligibility Investigation Open Date.
Close Date	The JPAS Eligibility Investigation Close Date.
Eligibility Date	The JPAS Eligibility Date.
Non-SCI	The JPAS Non-SCI Access.
SCI	The JPAS SCI Access.
Person Category	The JPAS Person Category.

Grade	The JPAS Grade.
Position Sensitivity	The JPAS Position Sensitivity.
Position Code	The JPAS Position Code.
Place of Birth	The JPAS Place of Birth.
Date of Birth	The JPAS Date of Birth.
NdA Date	The JPAS NdA Date.

Personnel DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Personnel, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.

Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

you can increase the size in Utilities/System Customization/Maximum Image size

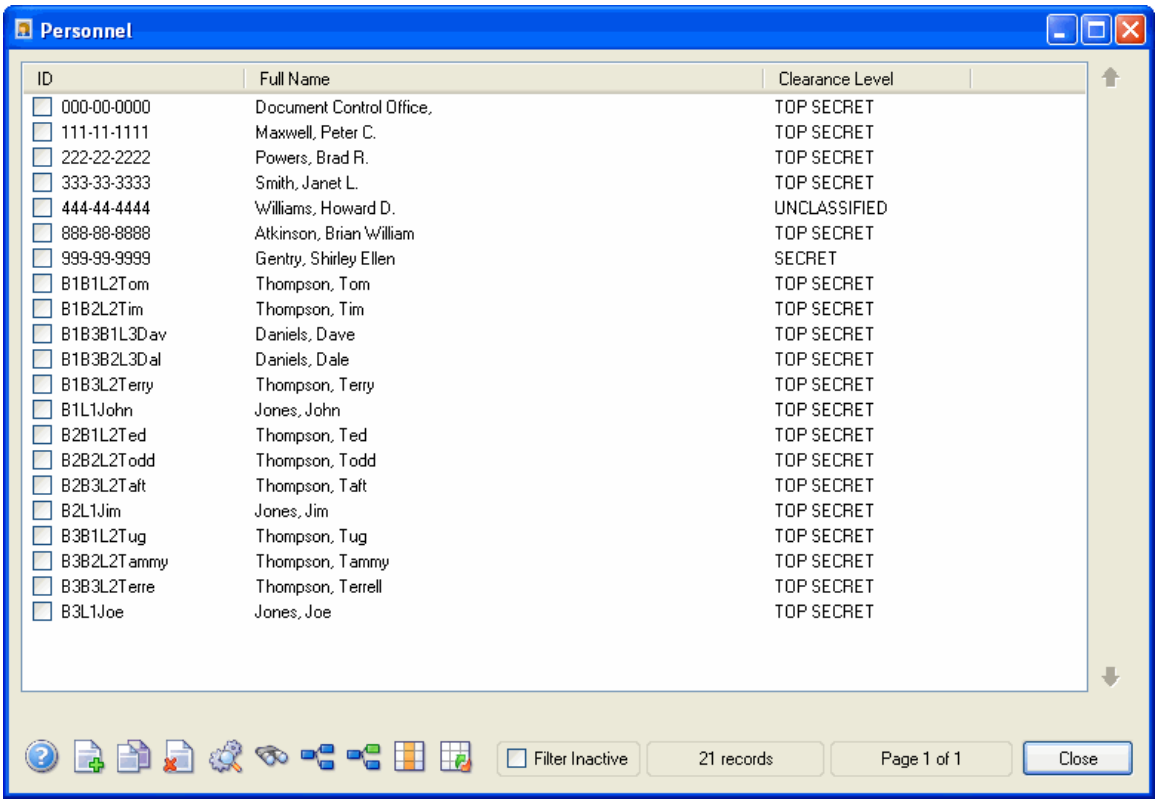
Cleared Personnel List

Default Output List

The default Cleared Personnel Output list screen shows the Name, Clearance Level, and ID for each personnel record.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields.


Personnel
ID
Full Name
Clearance Level
000-00-0000 Document Control Office, TOP SECRET
111-11-1111 Maxwell, Peter C. TOP SECRET
222-22-2222 Powers, Brad R. TOP SECRET
333-33-3333 Smith, Janet L. TOP SECRET
444-44-4444 Williams, Howard D. UNCLASSIFIED
888-88-8888 Atkinson, Brian William TOP SECRET
999-99-9999 Gentry, Shirley Ellen SECRET
B1B1L2Tom Thompson, Tom TOP SECRET
B1B2L2Tim Thompson, Tim TOP SECRET
B1B3B1L3Dav Daniels, Dave TOP SECRET
B1B3B2L3Dal Daniels, Dale TOP SECRET
B1B3L2Terry Thompson, Terry TOP SECRET
B1L1John Jones, John TOP SECRET
B2B1L2Ted Thompson, Ted TOP SECRET
B2B2L2Todd Thompson, Todd TOP SECRET
B2B3L2Taft Thompson, Taft TOP SECRET
B2L1Jim Jones, Jim TOP SECRET
B3B1L2Tug Thompson, Tug TOP SECRET
B3B2L2Tammy Thompson, Tammy TOP SECRET
B3B3L2Terre Thompson, Terrell TOP SECRET
B3L1Joe Jones, Joe TOP SECRET
Filter Inactive
21 records
Page 1 of 1
Close

Filter Inactive
Check the **Filter Inactive** check box to show terminated personnel on this output screen.
For more information about using this screen, see:

- List Screen Overview
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

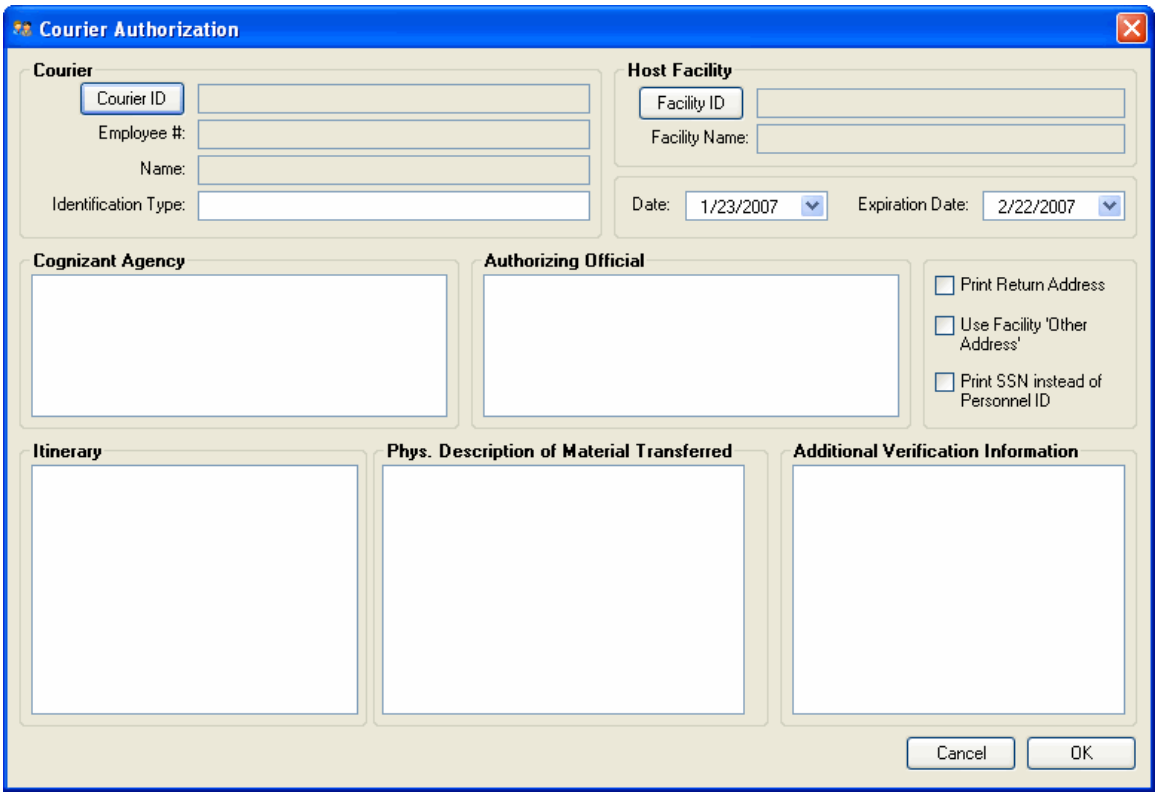
Cleared Personnel Reports

Reports Menu
For more information about the default reports that appear in every module, see:

- Standard Reports

The rest of this page describes module-specific reports.

Courier Authorization
This report prints a valid courier authorization, complete with instructions for the courier. A dialog box prompts for information about the courier, the articles to be transferred, and the destination.



Click Courier ID to select the courier from the Cleared Personnel module. The report contains all of the required data along with courier instructions and places for necessary signatures.

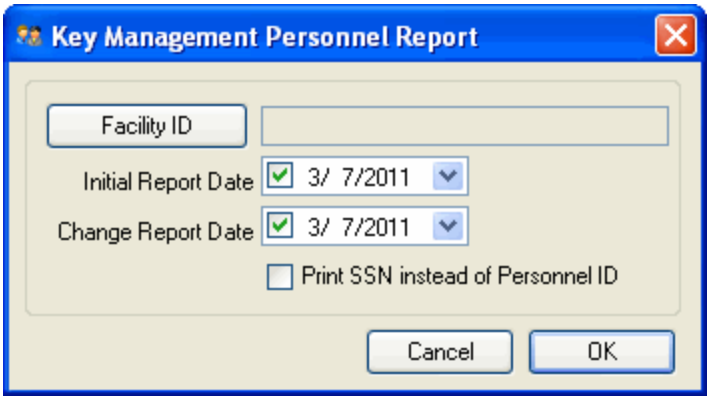
For more information about using this screen, see Input Screen.
Cleared Personnel, Courier Authorization Report Page Fields

Field Name	Description

Courier ID	Click to select the courier from the Cleared Personnel module.
Employee #	The employee number of the selected courier is completed automatically.
Name	The name of the selected courier is completed automatically.
Identification Type	Enter the type of identification.
Facility ID	Click to select the host facility.
Facility Name	The name of the selected host facility is completed automatically.
Date	The date of the courier authorization.
Expiration Date	The date that the courier authorization expires.
Cognizant Agency	The cognizant agency authorizing the courier.
Authorizing Official	The official from the cognizant agency authorizing the courier.
Print Return Address	Select to print the facility's return address.
Use Facility 'Other Address'?	Select to use the facility's other address when printing a return address.
Print SSN instead of Personnel ID	Choose this option if you want to print the SSN number field instead of the Personnel ID. The SSN number can be displayed in the personnel record is the option to "Show SSNs" is checked in the User Properties.
Itinerary	The itinerary of the courier.
Phys. Description of Material Transferred	A description of the material to be transferred.
Additional Verification Information	Any additional verification information.

Key Management Personnel List

This report prints a list of all employees that are considered to be Key Management Personnel (KMP). These personnel are also known as OODEPs (Owners, Officers, Directors, Partners, Regents, Trustees, or Executive Personnel). All non-terminated personnel with the KMP check box selected will be included.



For more information about using this screen, see Input Screen.

Cleared Personnel, Key Management Personnel Report Page Fields

Field Name	Description
Facility ID	Click to select the facility of the key management personnel.
Initial Report Date	Edit the Initial Report Date that will appear on the report.
Change Report Date	Edit the Change Report Date that will appear on the report.
Print SSN instead of Personnel ID	If unchecked, the Personnel ID will display on the report. Check this box if the SSN should be displayed.

Document Accountability

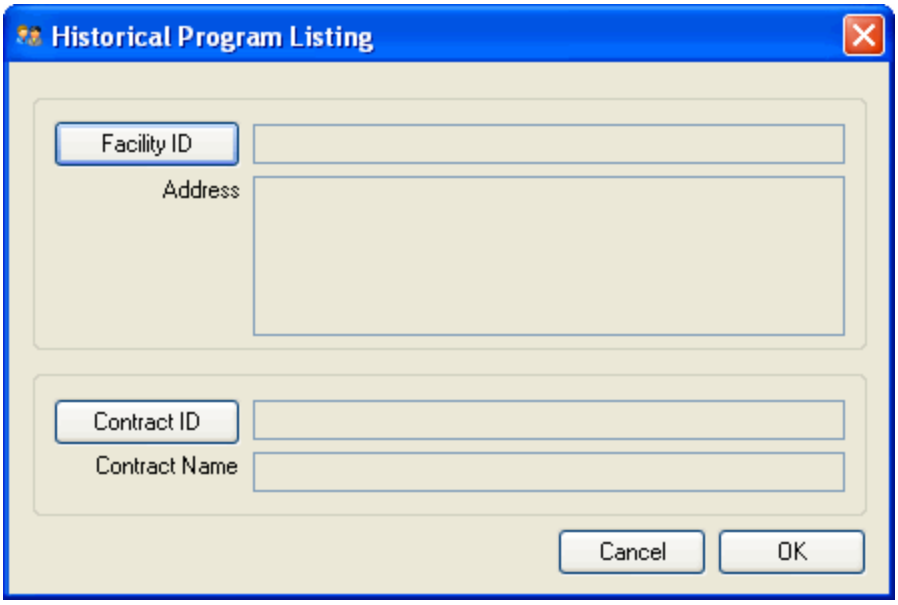
This report lists all documents assigned to the selected personnel shown on the Cleared Personnel Output Screen.

Special Access Tracking

This report lists all Special Accesses, Types, Sent To, Title, Sent, and Return tracking for all personnel shown on the output list screen.

Historical Program Listing

This report lists personnel associated with a specified contract at a specified facility.



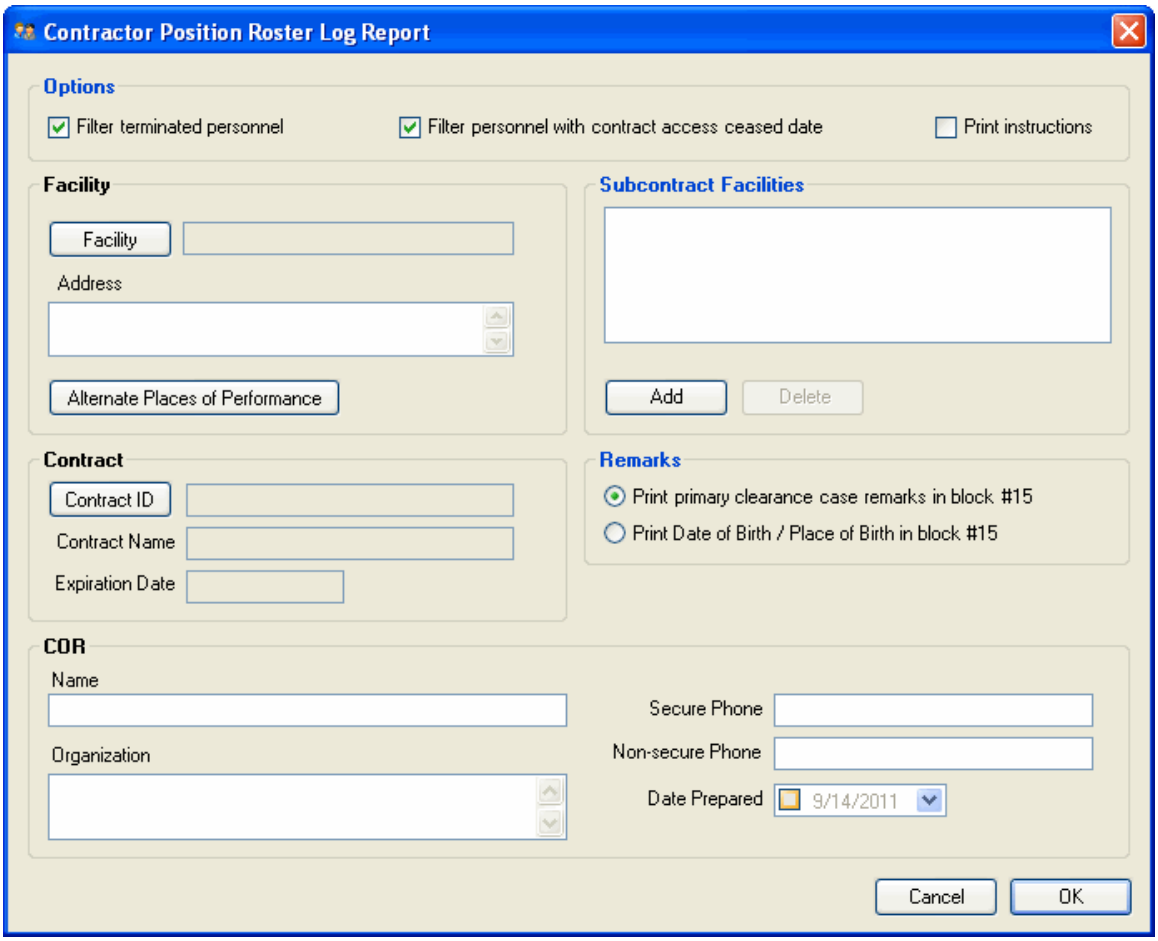
For more information about using this screen, see Input Screen.

Cleared Personnel, Historical Program Listing Report Page Fields

Field Name	Description
Facility ID	Click to select the facility for the historical program listing.
Address	The address is automatically completed upon selection of the facility ID.
Contract ID	Click to select the contract for the historical program listing.
Contract Name	The contract name is automatically completed upon selection of the contract ID.

Contractor Position Roster Log

This report prints a form listing contractor positions and access requirements for contractor personnel associated with a specified contract at various company locations.



For more information about using this screen, see Input Screen.

Cleared Personnel, Contractor Position Roster Log Report Page Fields

Field Name	Description
Filter terminated personnel	If checked, terminated personnel will be filtered in the report.
Filter personnel with contract access ceased date	If checked, personnel with contract access ceased date will be filtered in the report.
Print instructions	If checked, instructions will print at the end of the report.
Facility	Click to select the facility for the contractor position roster log.
Address	The address is automatically completed upon selection of the facility ID.
Alternate Places of Performance	Click to select one or more alternate places of performance.

Contract ID	Click to select the contract for the contractor position roster log.
Contract Name	The contract name is automatically completed upon selection of the contract ID.
Expiration Date	The contract expiration date is automatically completed upon selection of the contract ID.
COR Name	Enter the COR name.
COR Organization	Enter the COR organization information.
Subcontract Facilities	Choose the Add button to use the Facility pick list screen. Choose the Delete button to remove any subcontract facilities in the list.
Remarks	Choose Remarks by selecting a radio button.
Phone	Enter the COR's secure and/or unsecure telephone number(s).
Date Prepared	The date the report was prepared.

Program Access Log
This report prints a program access log form for use with NSA/CSS programs.

Personnel by SA
This report lists each Personnel associated with each Special Access, as defined in Utilities > Special Access Definitions.

Personnel By SA Billet Number
This report lists each Personnel associated with each Special Access billet number.

Personnel Document Count
This report each Personnel and their document count.

Personnel Clearance and SA
This report lists each Personnel by clearance level and by each Special Access.

Personnel Count By SA
This report lists the number of Personnel assigned to each Special Access.

Personnel Count By Level
This report lists the number of Personnel assigned to each Clearance Level.

Personnel Count By SA and By Facility
This report lists the number of Personnel assigned to each Special Access and each Facility.

Personnel Termination Report
When a person is terminated, there is an option to print this report. This report can also be manually selected by selecting this option in the Reports menu.

Personnel Incident Report

This report summarizes incident records that are related to the selected Personnel record. The report can only be executed by users who have access to the Incidents module.

Security Profile
This reports lists all special accesses and other clearances for the selected personnel record(s).

Personnel Clearance Task Metrics
This report calculates the average number of days required to complete a set of personnel clearance tasks.

Briefed Personnel Chart
This report provides a personnel chart based on the following parameters: Facility ID, Special Accesses, Year Briefed.

Personnel Clearance Task Metrics

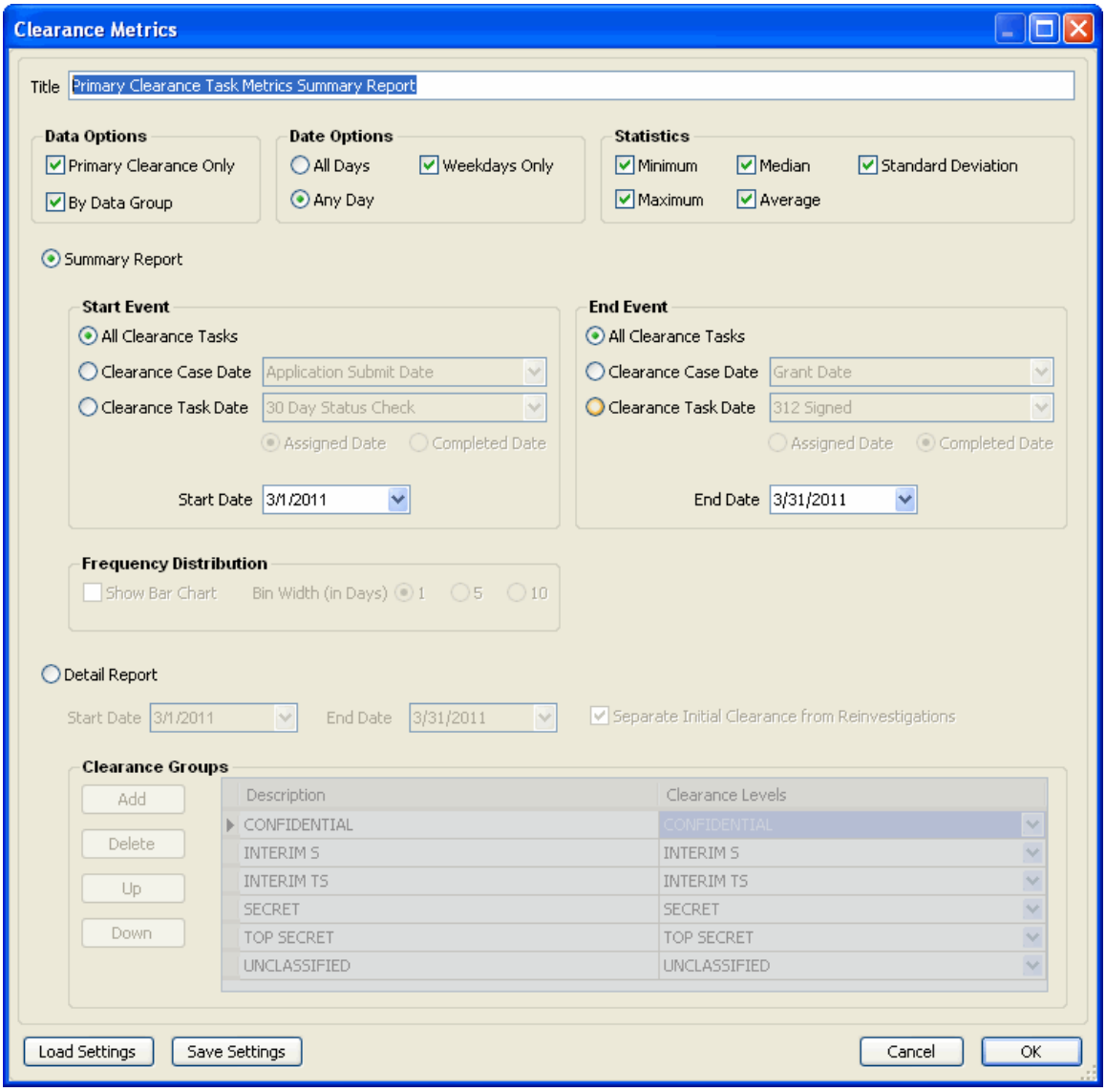
This report is a valuable tool for obtaining statistics regarding how long it is taking to perform important security clearance related tasks, including security clearance processing and reinvestigations.

To access the report, open the Personnel module and view the output screen. Like most reports, if there is a selection in the output list, only the data related to those records are included in the report. Otherwise, all records currently shown in the output list (or on a page not yet displayed when record paging is turned on) are used.

Next go to the Reports menu, and scroll down to the Personnel Clearance Metrics report.



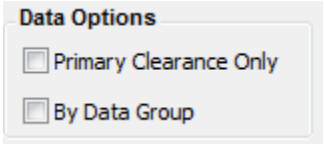
A window will appear with different options available for the report.



The first field indicates the title of the report. A default title appears, but this is a free flowing text field and can be easily changed if needed.

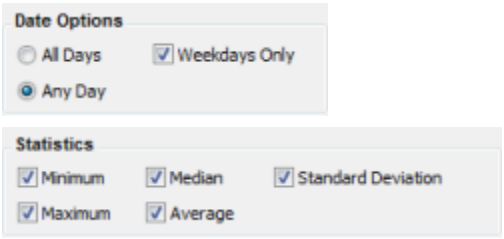
Next, the Data Options available for this report are simple check boxes. If the "Primary Clearance Only" box is checked, SIMS will report on only the primary clearances listed for personnel, if unchecked, the report will include all clearance cases.

The "By Data Group" check box, allows users to segregate the report by data groups. If unchecked, the report will reflect data across the entire enterprise.



The next set of selections tells SIMS how to calculate the Date Options for the report. If "All days" is checked, both the event start **and** end dates must fall within the range of dates noted within the date range of the report. If "Any

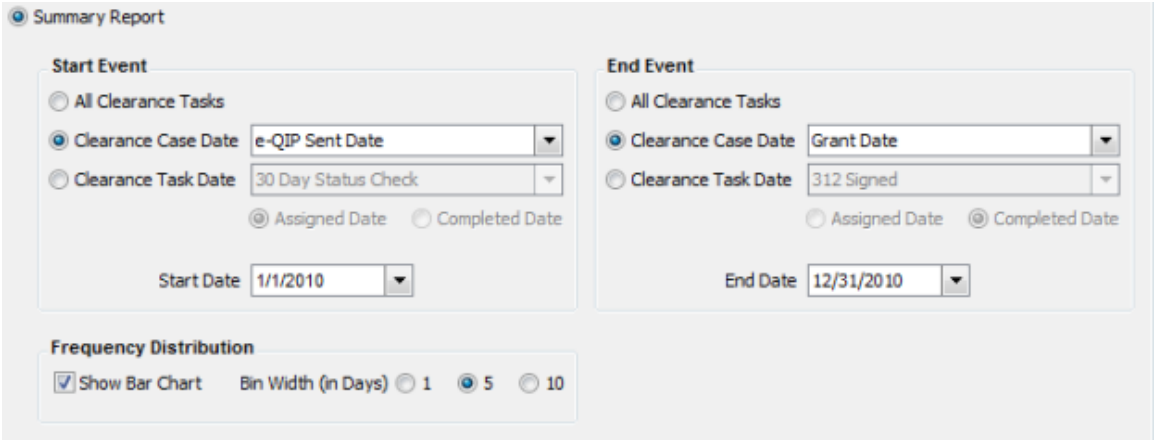
Day" is selected, at least one day from the start to the end date must fall in the date range of the report. You'll also notice there is a check box for "Weekdays Only". When checked, the report will only calculate the number of weekdays a task or clearance took to complete and remove any weekend days from the calculations.



The Statistics section allows users to identify which statistics are to be included on the report.
If a checkbox is checked, the information will be contained in the report, left unchecked, the information will not be included.

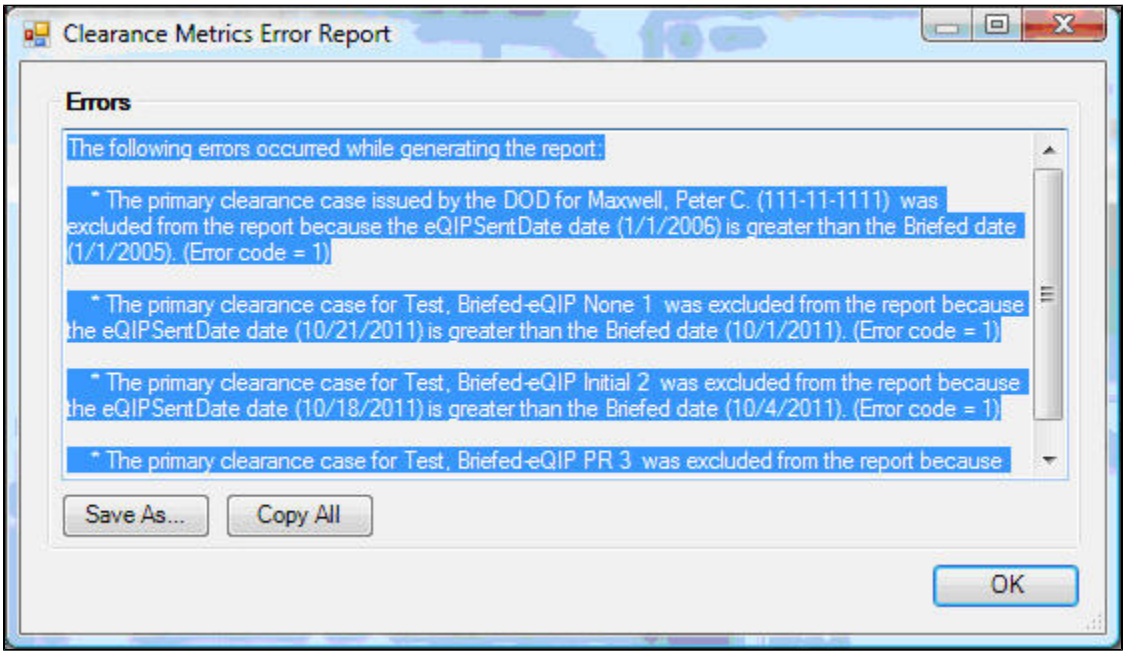
Minimum - minimum length of time a task or clearance took to complete
Maximum - longest length of time a task or action took to complete
Median - midpoint in a sorted string of values
Average - sum of all values divided by the total number of values
Standard Deviation - measurement of variability. A low standard deviation indicates that the data points tend to be very close to the average, whereas a high standard deviation indicates that the data is spread out over a wide range of values.

The report contains a radio button for Summary Report and a little further down the screen one for the Detailed Report. There are some fundamental differences with these reports.



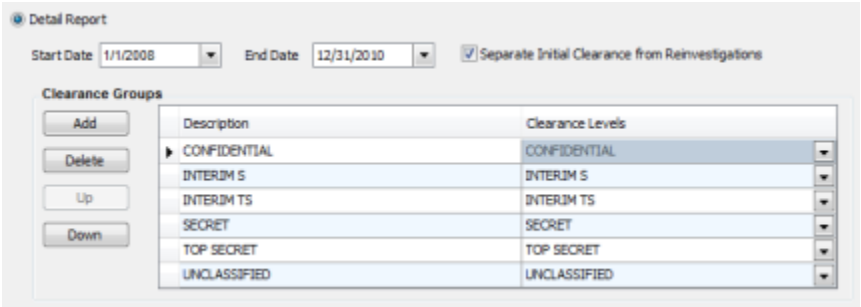
There are two different formats for a summary report. The first calculates statistics from all of the clearance tasks that have a both an assigned date and a completed date. This provides an overview of all the tasks. This format is selected when the 'All Clearance Tasks' radio button is selected.

The second summary report format calculates statistics from one event to another. The start and stop events can be either (a) a clearance case date (e.g., e-QIP Sent Date, Grant Date, Brief Date, etc.) or (b) the assigned or completed date of a clearance task. You can mix and match between the two. If the second format of the summary report is selected and the date of the end event comes before the date of the start event for a particular record, the record will not be used in calculating the statistics and an error message will be reported (see below). This issue can due to several possible scenarios: 1) data entry error; 2) start/end event selection error; or 3) the start event was updated to represent another iteration while the end event still represents the previous (or first) iteration (e.g., e-QIP Sent Date and Brief Date after the former is updated for a periodic reinvestigation).

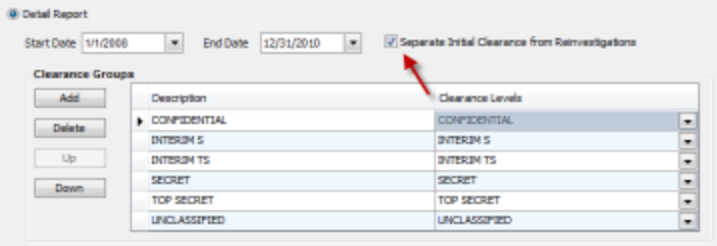

Clearance Metrics Error Report
Errors
The following errors occurred while generating the report:
* The primary clearance case issued by the DOD for Maxwell, Peter C. (111-11-1111) was excluded from the report because the eQIPSentDate date (1/1/2006) is greater than the Briefed date (1/1/2005). (Error code = 1)
* The primary clearance case for Test, Briefed-eQIP None 1 was excluded from the report because the eQIPSentDate date (10/21/2011) is greater than the Briefed date (10/1/2011). (Error code = 1)
* The primary clearance case for Test, Briefed-eQIP Initial 2 was excluded from the report because the eQIPSentDate date (10/18/2011) is greater than the Briefed date (10/4/2011). (Error code = 1)
* The primary clearance case for Test, Briefed-eQIP PR 3 was excluded from the report because
Save As...
Copy All
OK

Frequency Distribution offers a bar chart of the frequency of occurrence. Select this check box to include a bar chart of the calculations for clearance tasks or clearance case actions. Bin width allows users to group duration results in 1, 5 or 10 day increments.

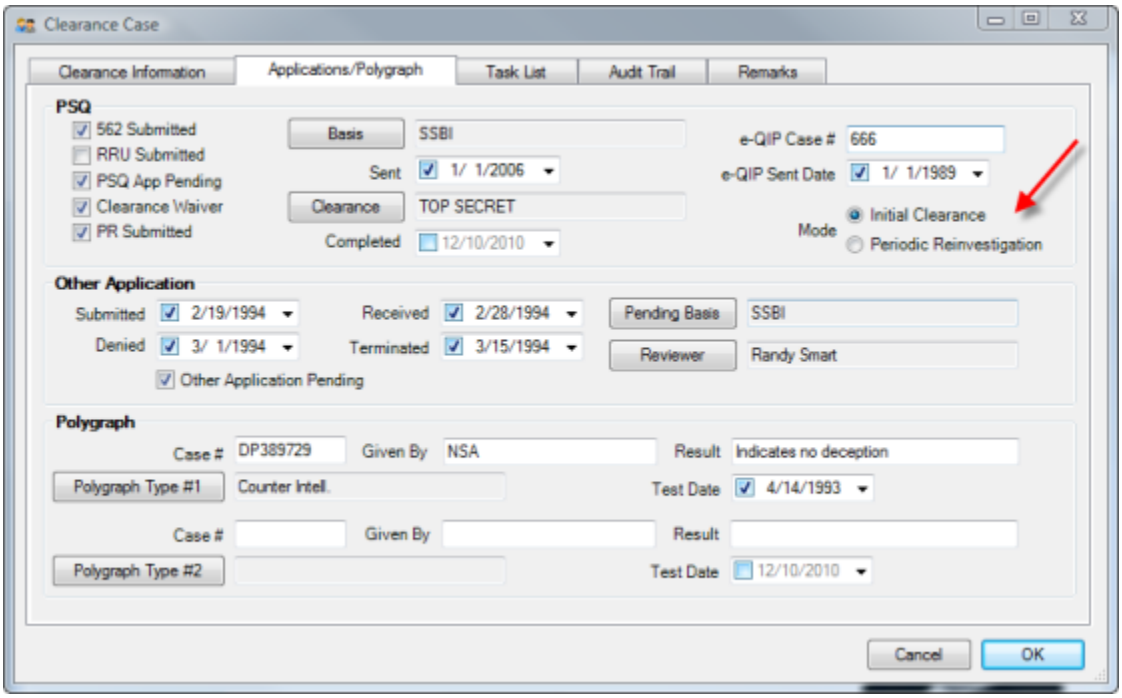
The Detail Report section of this report calculates statistics on how long it took for personnel to get an initial clearance or to perform a periodic reinvestigation on an existing clearance. Additionally, it provides statistics on clearance case processing for open or pending clearance cases. It is important to note here that a few fields must be indicated within a clearance case within personnel records in order for the proper results to generate on this report. Those fields are e-QIP Sent Date, Granted date and if an investigation is in progress then PSQ App Pending should be checked. This last step is recommended for clarity but is optional, since the order of the e-QIP Sent Date and Granted date or absence of a Granted date can be used to infer whether a clearance case is still pending or not.



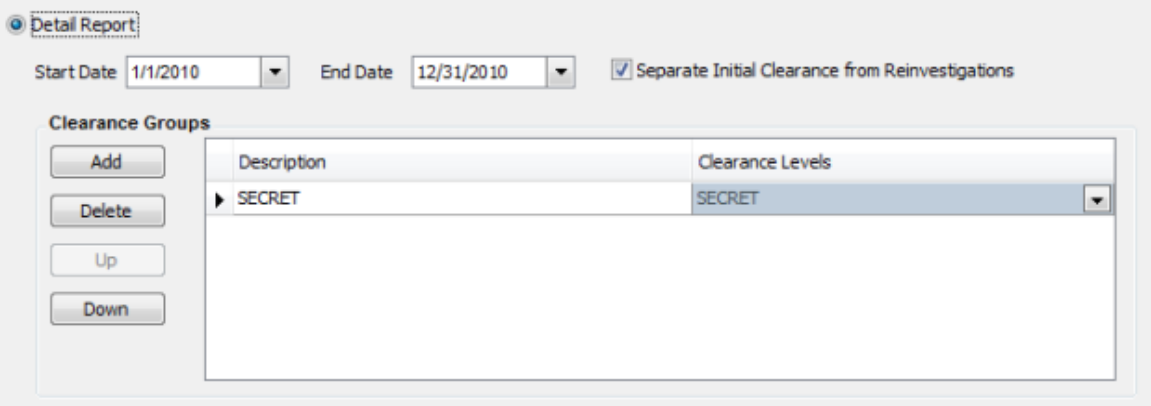
If Separate Initial Clearances from Reinvestigations is checked, the report results will be grouped for initial investigations, periodic reinvestigations and possibly unspecified categories, left unchecked all results will be grouped together.



**Note that there are radio buttons on the Applications/Polygraph tab of the Clearance Case dialog to indicate whether an e-QIP Sent Date refers to an Initial Clearance or a Periodic Reinvestigation on a clearance case.*



Under the Clearance Groups area, there is an opportunity to determine which clearances are to be included on this report, as well as to create groups of clearance levels to be reported on together, such as SECRET and INTERIM SECRET. By default, each of the clearance levels defined in the Clearance Levels utility is shown in a clearance group with the same name. To change the name of a clearance group, simply select the name in the list and type the new name. To change the clearance levels assigned to a clearance group, click the drop down arrow next to the clearance level and select the check box or boxes from the list of available clearances. To delete a clearance group, select it by clicking on the row in the table to set the active row indicator (a triangle) on the row and then click on the Delete button. To add a new clearance group, click on the Add button.



The last 2 buttons are the Save Settings and Load Settings buttons. After this report is set up appropriate to the desired results and the is report is to be run on a recurring basis, save the layout by clicking Save Settings and next time the report is needed, click Load Settings and everything previously set up will appear on the screen the way it was saved.

A very colorful report comes up with lots of information on it. There are 3 sections on the report: Clearance Case Closing Cycle Time, Closed Case Timeliness, and Pending Clearance Cases.

Section 1 – Clearance Case Closing Cycle Time
This section computes statistics on the clearance cases that have both an e-QIP Start Date and a Granted date. The former must be before the latter.

Section 2 – Closed Case Timeliness
This section uses the same data as the Closing Cycle Time but it groups the clearance cases into one of six ranges based upon the number of days between the e-QIP Start Date and the Granted date.

Section 3 – Pending Clearance Cases
A clearance case will be included in the statistics reported for this section if (1) the clearance case is for a clearance level that is listed in one of the Clearance Groups; (2) the e-QIP Start Date is between the Start Date and End Date; and (3) at least one of the follow is true: (a) the PSQ App Pending checkbox on the Applications/Polygraph tab of the Clearance Case dialog is checked; (b) the Granted date of the Clearance Information tab of the Clearance case dialog is not checked; (c) the Granted date is less than the e-QIP Sent Date on the Applications/Polygraph tab, implying that the clearance is undergoing a periodic reinvestigation; or (d) the Granted date is greater than the report end date.

All Clearance Process Metrics Detail Report

Days from e-QIP Sent Date to Grant Date Occurring Any Time During 1/1/2010 and 12/31/2010

Across all represented data groups

Clearance Case Closing Cycle Time

Description	Count	Minimum	Maximum	Median	Average	Standard Deviation
SECRET - Initial Clearance	36	32	335	182.00	182.47	74.78

Closed Case Timeliness

SECRET - Initial Clearance	Count	Percent
1 to 60 Days	3	8.3%
61 to 120 Days	3	8.3%
121 to 240 Days	20	55.6%
241 to 360 Days	10	27.8%
361 Days to 18 Months	0	0.0%
Over 18 Months	0	0.0%
Total SECRET - Initial Clearance	36	100.0%

Pending Clearance Cases

Through 12/15/2010

SECRET - <Unspecified>	Count	Percent
1 to 60 Days	1	1.4%
61 to 120 Days	5	6.8%
121 to 240 Days	20	27.4%
241 to 360 Days	46	63.0%
361 Days to 18 Months	0	0.0%
Over 18 Months	1	1.4%
Total SECRET - <Unspecified>	73	100.0%

Cleared Personnel Transactions

Deny Container Access

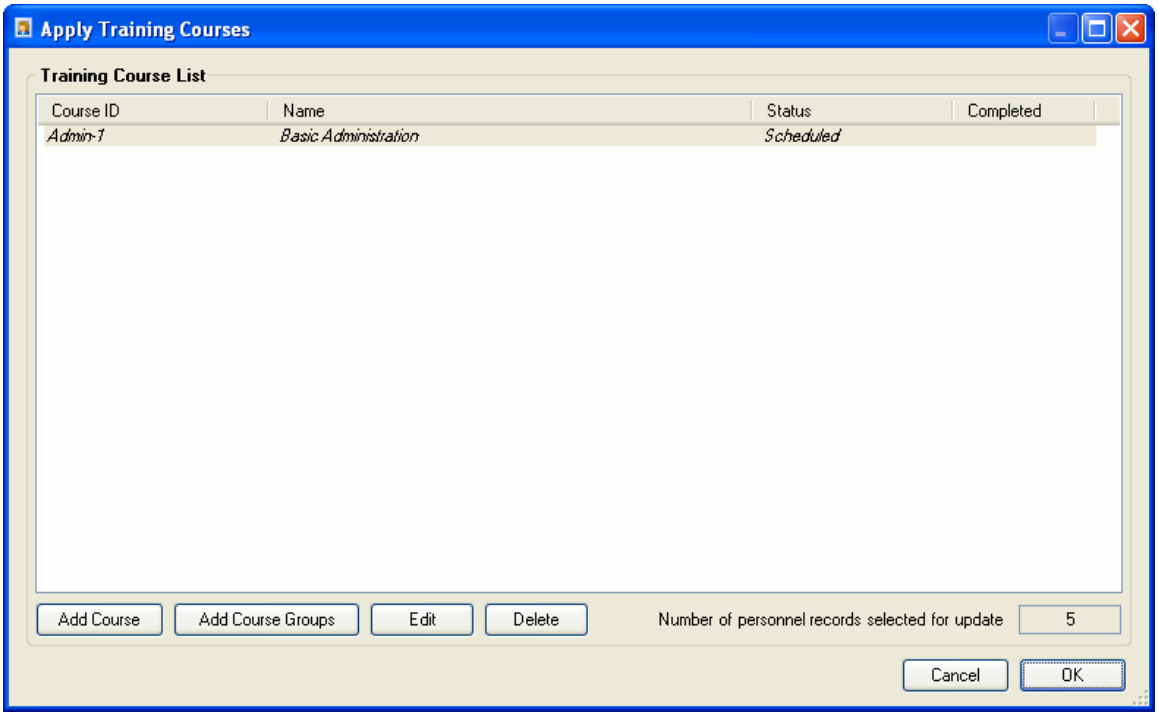
This item will deny access to all containers for selected individuals. The system date is put into the Denied Date for each container a individual has access to. Select a person or group of persons by highlighting them in the output list (or use Find for a more sophisticated query) and then choose "Deny Container Access" from the Transactions menu. A dialog will be displayed confirming the person(s) selected.

Load ScanSet

The Load ScanSet selection allows a previously downloaded bar code file to be used to select personnel.

Apply Training Courses

This transaction allows multiple training records to be assigned to multiple personnel in a single operation. First query for the personnel records that you want to add a training course for in the output list screen. In the transaction dialog, choose the Add button to add either a specific course or a course group to the selected Personnel records.



JPAS Import

This function lets you import data into SIMS that was exported from JPAS to a .csv file. SIMS Managers automatically have the ability to import JPAS reports into SIMS; but it is important to verify that other User(s) identified have been assigned to perform the JPAS transaction prior to attempting the import.

To give a User account access to the JPAS Transaction:

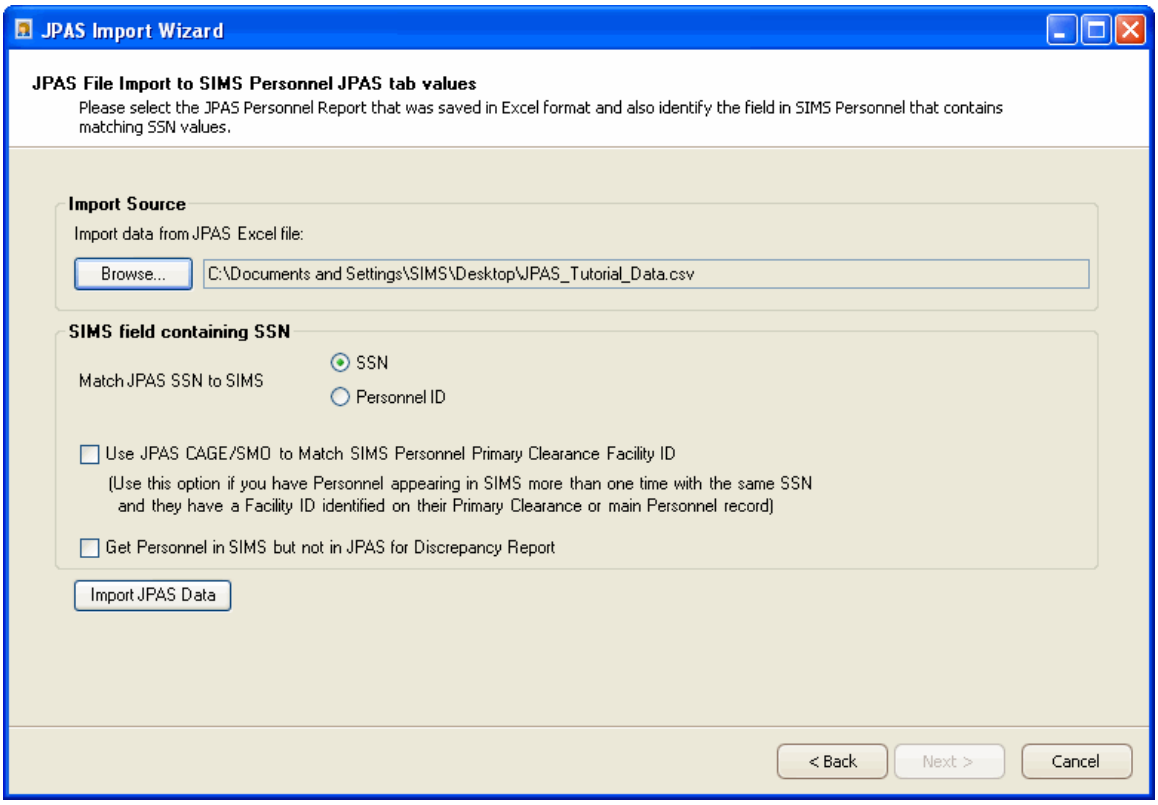
1. Go to Utilities.
2. Select User Management from the top of the screen.
3. Select the appropriate user account.
4. Next select "*Allow JPAS Import transaction*" from the User Option section of User Properties.
5. Click OK.

The SIMS tutorial JPAS sample looks like the following:

	A	B	C	D	E	F	G	H	I	J
1	Relationsh	Orguic	FormattedSSN	FullName	Eligibilitydesc	Eligdate	Investdispl	Investdate	PersonCat	Secur
2	O	A1000	111-11-1111	MAXWELL, PETER	SCI	7/9/2002 0:00	SSBI	1/9/2002 0:00	Industry	N/A
3	O	A1000	222-22-2222	POWERS, BRAD R	TS	4/20/1994 0:00	NLC	10/20/1994 0:00	Industry	N/A
4	O	A1000	333-33-3333	SMITH, JANET L.	TS	8/30/2001 0:00	PRSC	2/18/2001 0:00	Industry	N/A
5	O	A1000	444-44-4444	WILLIAMS, HOWAF	C	3/25/1959 0:00	NAC	9/25/1958 0:00	Industry	N/A
6	O	A1000	888-88-8888	ATKINSON, BRIAN	TS	2/11/2003 0:00	PRS	8/11/2002 0:00	Industry	N/A
7	O	A1000	999-99-9999	GENTRY, SHIRLEY	S	11/1/2001 0:00	NLC	5/1/2001 0:00	Industry	N/A
8										
9										
10										

Before you can import you must make sure you've identified the JPAS Access Level for each Clearance Level in Utilities -> Clearance Levels. This is so SIMS can match "TS" in JPAS with "Top Secret" in SIMS or whatever other clearance levels you have defined. In the Cleared Personnel output list screen, select the menu option Transactions -> JPAS Import. A wizard dialog will appear.

Choose the Next button to continue.


JPAS Import Wizard
JPAS File Import to SIMS Personnel JPAS tab values
Please select the JPAS Personnel Report that was saved in Excel format and also identify the field in SIMS Personnel that contains matching SSN values.
Import Source
Import data from JPAS Excel file:
Browse...
C:\Documents and Settings\SIMS\Desktop\JPAS_Tutorial_Data.csv
SIMS field containing SSN
Match JPAS SSN to SIMS
SSN
Personnel ID
Use JPAS CAGE/SMO to Match SIMS Personnel Primary Clearance Facility ID
(Use this option if you have Personnel appearing in SIMS more than one time with the same SSN and they have a Facility ID identified on their Primary Clearance or main Personnel record)
Get Personnel in SIMS but not in JPAS for Discrepancy Report
Import JPAS Data
< Back
Next >
Cancel

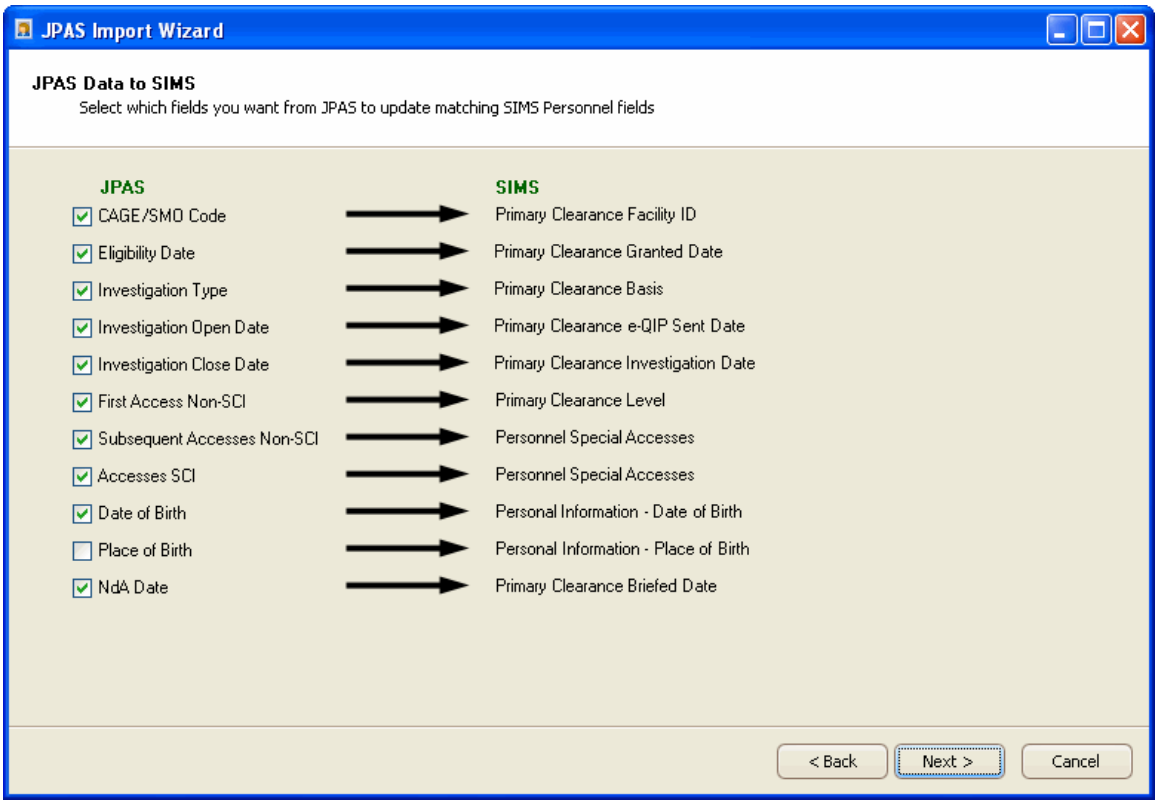
Browse for the JPAS data file which should have a .csv file extension. Choose to match the JPAS SSN field to SIMS using either the SIMS SSN field or the Personnel ID field. If you're using the SIMS SSN field for the Social Security Number instead of the Personnel ID, then you should select the SSN option. Otherwise, select the Personnel ID option.

If desired, select the check box option option to use JPAS records to match the JPAS Organization CAGE/SMO Code to that of the Facility ID indicated for the Primary Clearance Case.

If desired, select the check box option option to Get Personnel in SIMS but not in JPAS for Discrepancy Report. A discrepancy in this regard would occur if:

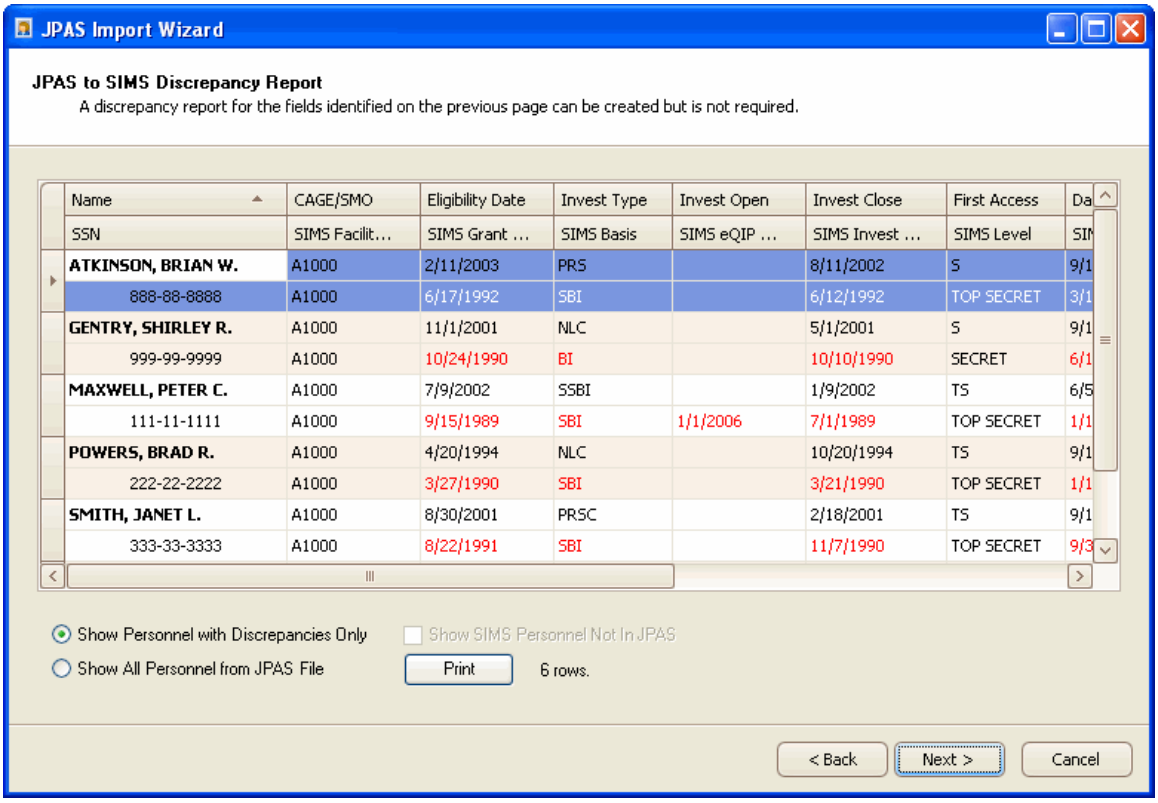
1. A personnel is in SIMS but not in the JPAS spreadsheet, and
2. The personnel entry has a Primary Clearance, and
3. The Primary Clearance has "JPAS Ineligible" checked.

Click on "Import JPAS Data" to have SIMS read the spreadsheet file and match the record in the spreadsheet file with the ID in SIMS. Choose the Next button.



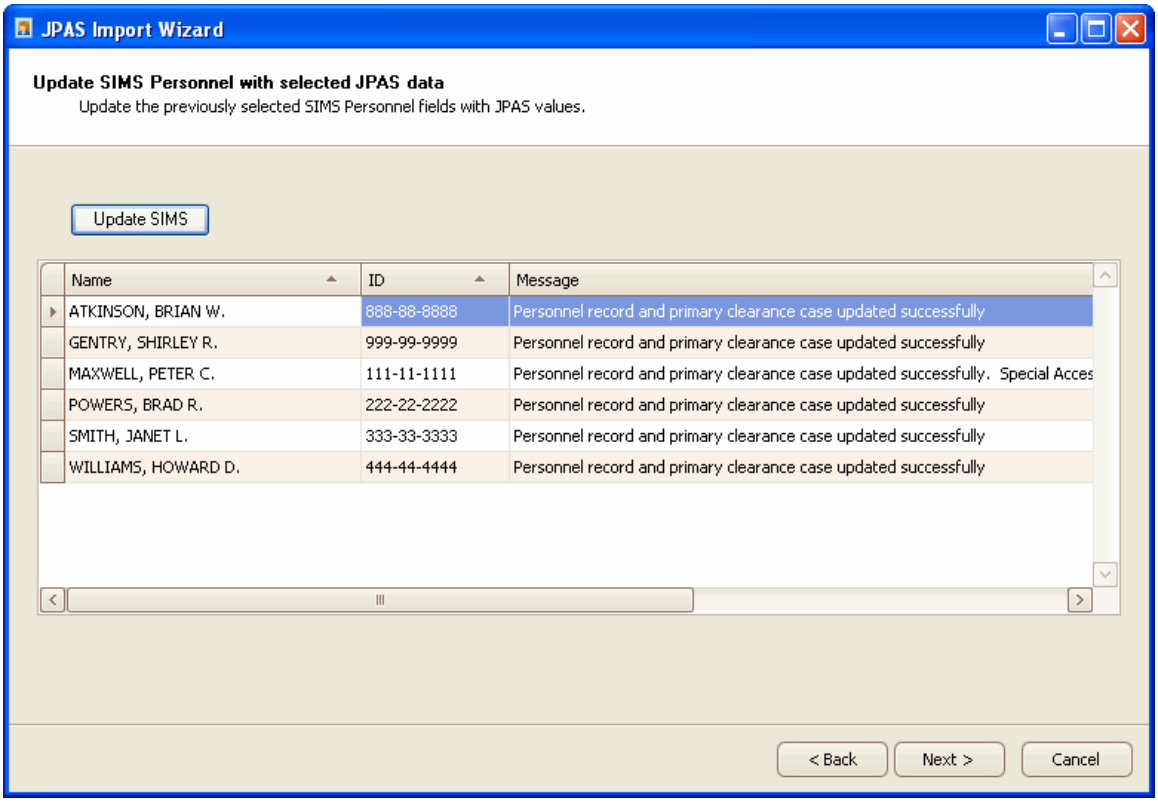
In the JPAS field selection area, you can select the fields that you want updated. Uncheck any fields that you do not wish to update. Note: If the field Place of birth field is selected, the results may differ between JPAS and SIMS and create discrepancies due to the fact that JPAS stores only the state of birth and not city and state.

Choose the Next button.


JPAS Import Wizard
JPAS to SIMS Discrepancy Report
A discrepancy report for the fields identified on the previous page can be created but is not required.
Name
CAGE/SMO
Eligibility Date
Invest Type
Invest Open
Invest Close
First Access
SSN
SIMS Facilit...
SIMS Grant ...
SIMS Basis
SIMS eQIP ...
SIMS Invest ...
SIMS Level
ATKINSON, BRIAN W. A1000 2/11/2003 PRS 8/11/2002 S
888-88-8888 A1000 6/17/1992 SBI 6/12/1992 TOP SECRET
GENTRY, SHIRLEY R. A1000 11/1/2001 NLC 5/1/2001 S
999-99-9999 A1000 10/24/1990 BI 10/10/1990 SECRET
MAXWELL, PETER C. A1000 7/9/2002 SSBI 1/9/2002 TS
111-11-1111 A1000 9/15/1989 SBI 1/1/2006 7/1/1989 TOP SECRET
POWERS, BRAD R. A1000 4/20/1994 NLC 10/20/1994 TS
222-22-2222 A1000 3/27/1990 SBI 3/21/1990 TOP SECRET
SMITH, JANET L. A1000 8/30/2001 PRSC 2/18/2001 TS
333-33-3333 A1000 8/22/1991 SBI 11/7/1990 TOP SECRET
Show Personnel with Discrepancies Only
Show SIMS Personnel Not In JPAS
Show All Personnel from JPAS File
Print
6 rows.
< Back
Next >
Cancel

Choose whether to show only personnel with discrepancies or all personnel from JPAS file. Red items show discrepancies between SIMS and JPAS data. Check the box to show all SIMS personnel not in JPAS. Choose the Print button to print a hardcopy of the report.

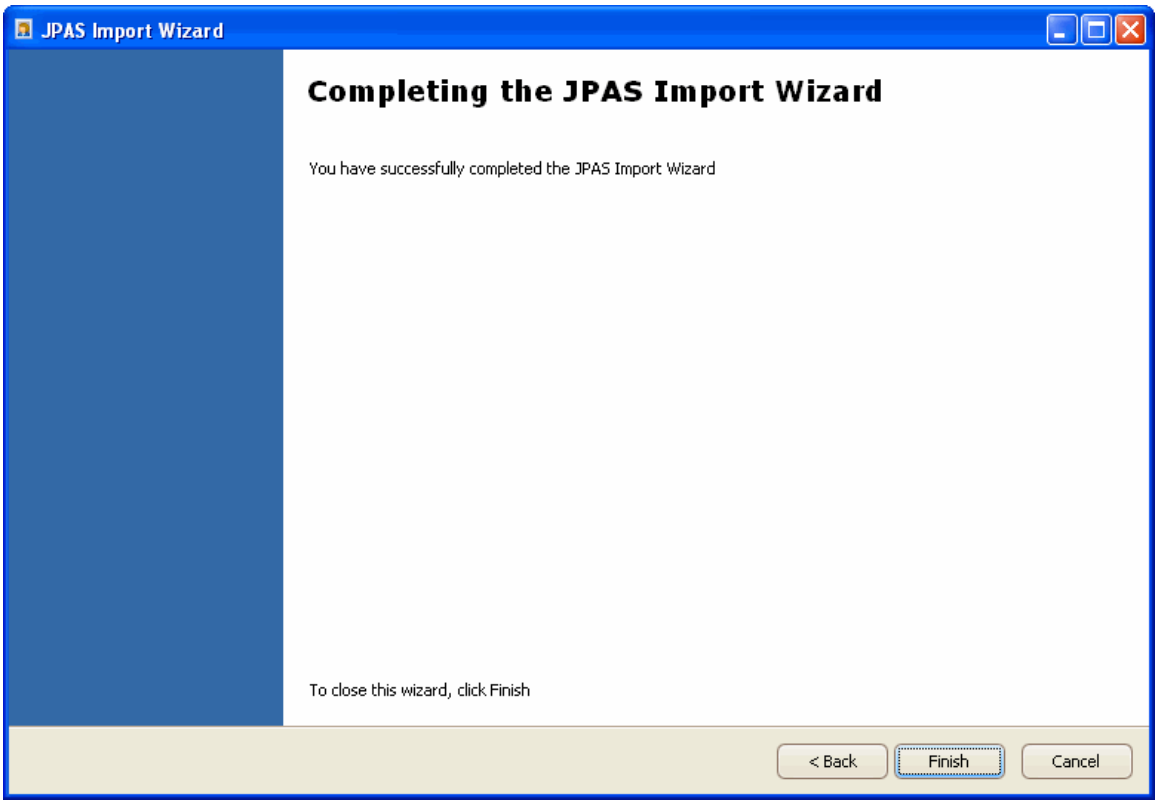
Choose the Next button.



If you click the "Update SIMS" button, SIMS will go through all Personnel records and update the selected fields with the corresponding JPAS information. The screen will show the total number of records that received an update from JPAS. For the Access Non-SCI to Primary Clearance Level, the value in the Utilities->Clearance Level Definitions will be used to locate the correct clearance level. In the Discrepancy report example, the "S" would be converted to "Secret" and that would be the new clearance level for Atkinson, Brian W. The Cleared Personnel Clearance Audit Trail for the personnel record will also update to indicate that the clearance was changed by a JPAS import. Select the Next button to continue.

Note:
If you choose not to overwrite the information in SIMS with the information from JPAS, simply choose cancel on this screen and no information will be overwritten. It is important to note that based on the results from the discrepancy reports, users may need to make some adjustments to an employee record and exclude that particular record from the import. To do this, open the individual record, click on the Cleared Personnel Clearances tab, open the primary clearance record and place a checkmark in the box which says "JPAS Update Ineligible".

If you notice there are multiple records to exclude from the import, exit out of the import dialog. Open the JPAS spreadsheet report and delete any individual rows from the import. Making this change will ensure these records are not included in the JPAS import and no information will be overwritten once the transaction is performed.



Choose the Finish button to close the JPAS Import Wizard dialog.

Refer also to the Cleared Personnel Input - JPAS topic.

Frequently Asked Questions:

1) **Is the file open?**
Solution: *Close the file and the program that has it open.*

2) **Has the file been saved as a .xls file?**
Solution: *This can be corrected by obtaining a JPAS file that uses .csv format.*

3) **Do you have permission to read the file?**
Solution: *Right click on the file and select Properties. Select the Security Tab then add the 'Everyone' user and give that file 'Full Control'. Save all changes.*

4) **Is the JPAS Import file located on a shared drive and opened by another user?**
Solution: *If so, please have all users close the JPAS file.*

5) **Did you install SIMS using Click Once on a 64-bit workstation?**
Solution: *You can install the SIMS Client using the MSI installer instead of the ClickOnce package. That will force the SIMS Client to run as a 32-bit process even if the operating system is 64-bit and you should be able to use your JPAS Import with your .csv file format.*

6) **Is it possible to add records when they show up in JPAS but not in SIMS?**
SIMS will only update its data during a JPAS Import. It will not add records if they do not exist in SIMS.

Containers

Purpose of Containers

Containers maintain information for all safes, vaults, or other storage facilities capable of storing classified information.

The Containers module maintains an inventory of all containers within the facility that are capable of storing classified information. A container could be a safe, a vault, or any approved storage device. In addition, a container could also be a conference room with a cipher lock or any other combination, cipher, or key lock device. Some of the items included in the Containers module are container identifier (ID), maximum classification level of material to be stored, any special accesses required for access to the container, a list of those employees with access, and location in the facility.

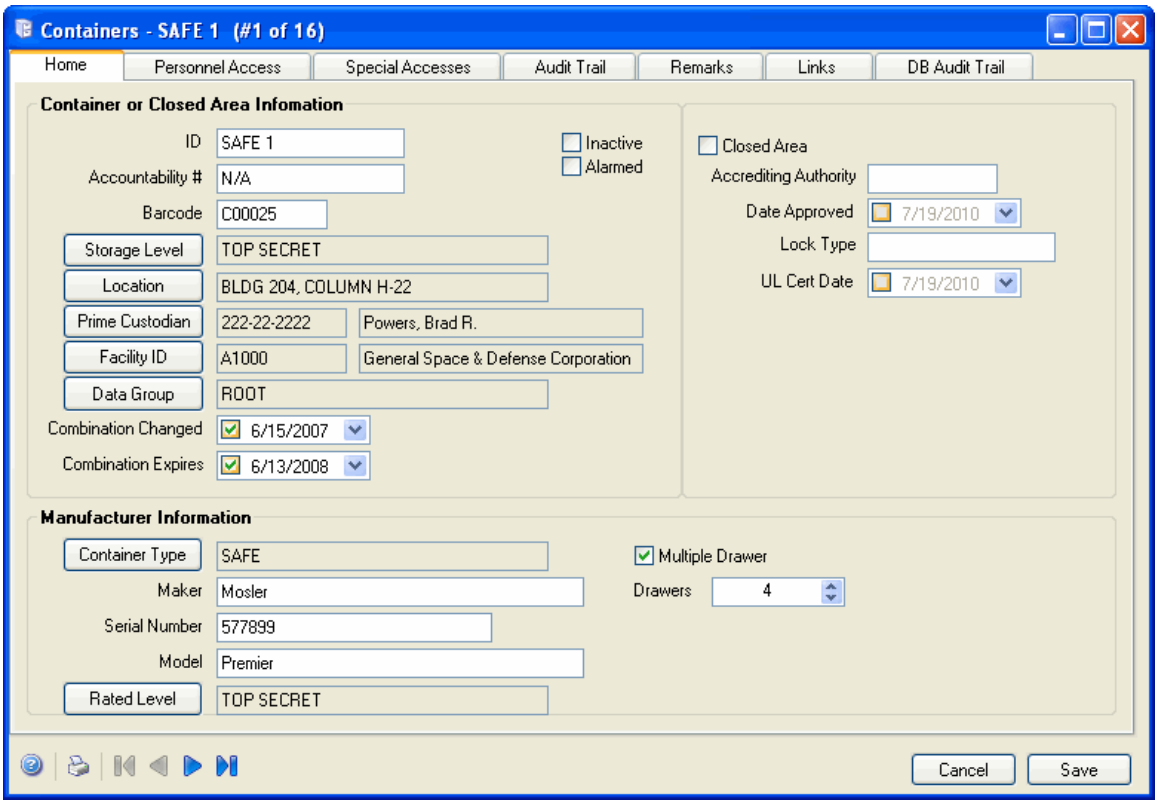
Input Screen Description
Home
Personnel Access
Audit Trail
Remarks
Links

List Screen Description
Default Output List

Reports
Reports

Containers Input

Containers Home



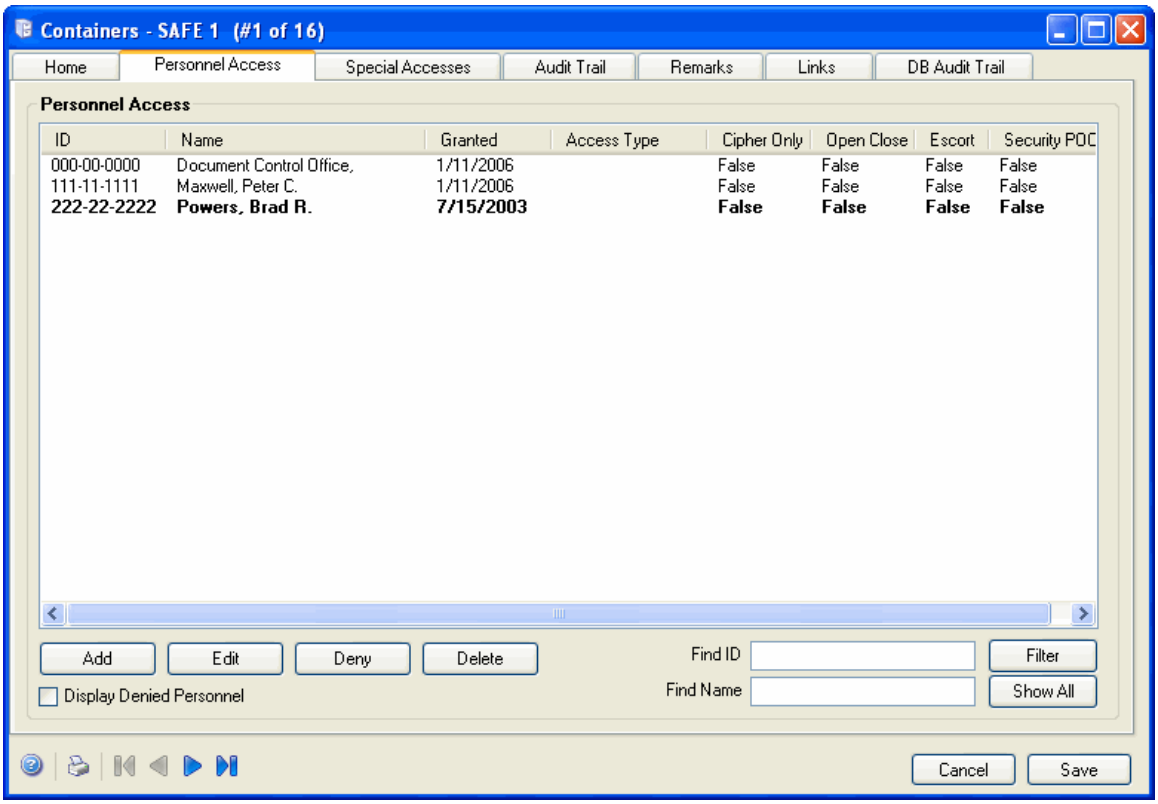
For more information about using this screen, see Input Screen.

Containers, Home Page Fields

Field Name	Description
ID	Any character and/or numerical string can be used for the Container ID.
Accountability #	The container's accountability number.
Inactive?	Check this box if the container is inactive.
Alarmed	Check this box if the container has an alarm.
Barcode	A container barcode label. You can enter the barcode manually via the keyboard or scan it in using a barcode reader.
Storage Level	The maximum storage level of the container from a pick list.
Location	The specific location of the container, such as a permanent office or a column number if in a very large room.

Prime Custodian	The Primary Custodian field is linked to the Personnel or Visitor Pick Lists. When a person is selected, the person is added to the access list, if they're not already on it.
Facility ID	The facility where the container is located may be selected from the Facility Record Picker by clicking **Facility ID**.
Data Group	The data group that the container belongs to. Data groups are defined in the User Management Data Groups dialog.
Combination Date Changed	The last date that the container combination was changed.
Combination Date Expires	The date that the container combination is next scheduled to be changed.
Type	This Pick List field contains the type of container and should describe the container's construction. For example, the container could be a file cabinet with a lock bar, safe, or a vault.
Maker	The container's manufacturer name.
Serial Number	The container's serial number.
Model	The container's model number.
Rated Level	The manufacturer-rated classification level.
Multiple Drawer	Indicates multiple drawers for this container.
Drawers	The number of drawers for the container.
Closed Area	Check if this record represents a Closed Area.
Accrediting Authority	Cognizant Security Agency (CSA) that accredited the area.
Date Approved	Date area was approved by CSA.
Lock Type	Type of lock on door, S&G, X-09, etc.
UL Cert Date	Date UL Cert was approved.

Containers Personnel Access



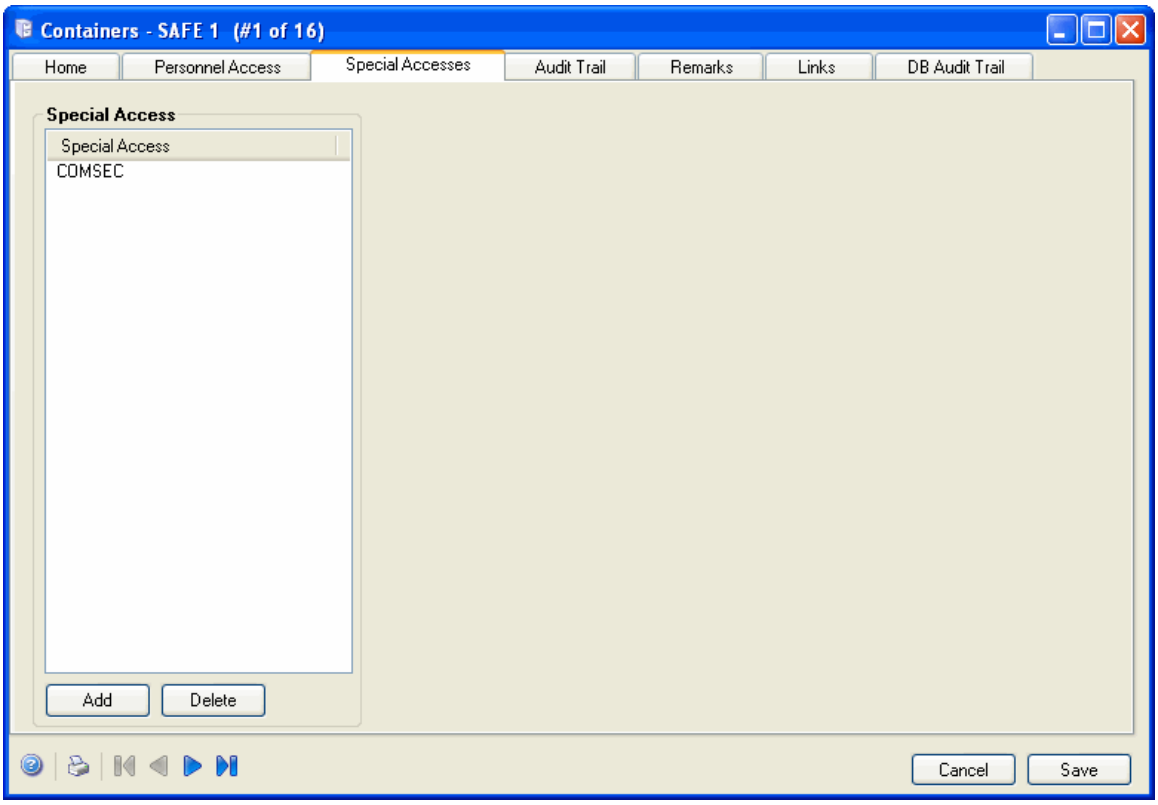
For more information about using this screen, see Input Screen.

Containers, Personnel Access Page Fields

Field Name	Description
ID	The ID of the person that has been granted access to the container.
Name	The name of the person that has been granted access to the container.
Granted	The date the person was granted access to the container.
Denied	The date the person was denied access to the container.
Access Type	The type of access.
Cipher Only	Indicates if the Cipher Only check box is checked or unchecked.
Open Close	Indicates if the Cipher Only check box is checked or unchecked.

Escort	Indicates if the Escort check box is checked or unchecked. If checked, it means that the personnel could be an escort.
Security POC	Indicates if the Security POC check box is checked or unchecked.
Find ID	Finds a person in the access list using the person's ID. Type in the ID of a person to find them on the current access list. This is useful if you have a large number of people with access to the container.
Find Name	Finds a person in the access list using the person's Name. Type in the person's Last Name to find them on the current access list. This is useful if you have a large number of people with access to the container.
Filter	Click on the appropriate button to filter the access list by ID or by Name
Show All	Show all of the persons on the access list. Using the Find options will display only the records found. To restore all records to the list, click **Show All**.
Display Denied Personnel	If checked, previously denied personnel will be displayed in the list.

Containers Special Accesses

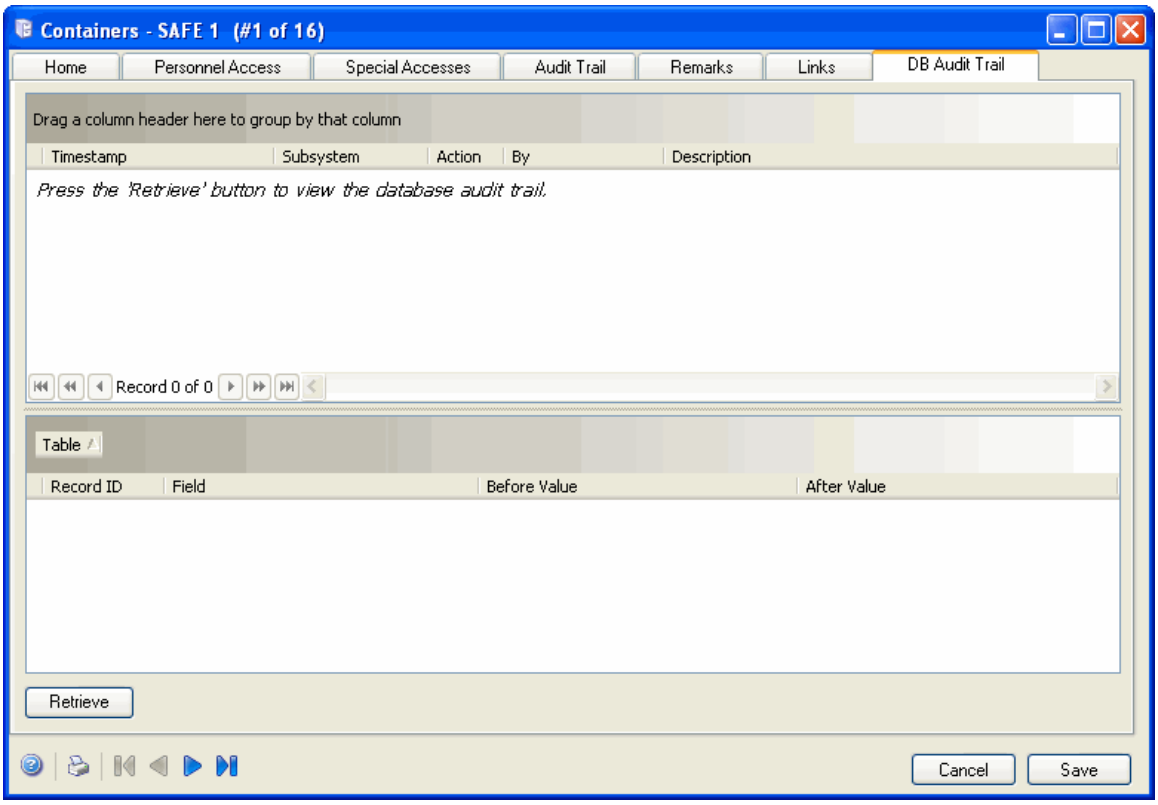


For more information about using this screen, see Input Screen.

Containers, Home Page Fields

Field Name	Description
Special Access	Special accesses are assigned by clicking **Add**. The appropriate special access can then be chosen from the Special Access Picker. The Special Accesses are defined in Utilities -> Special Access Definitions.

Containers Audit Trail

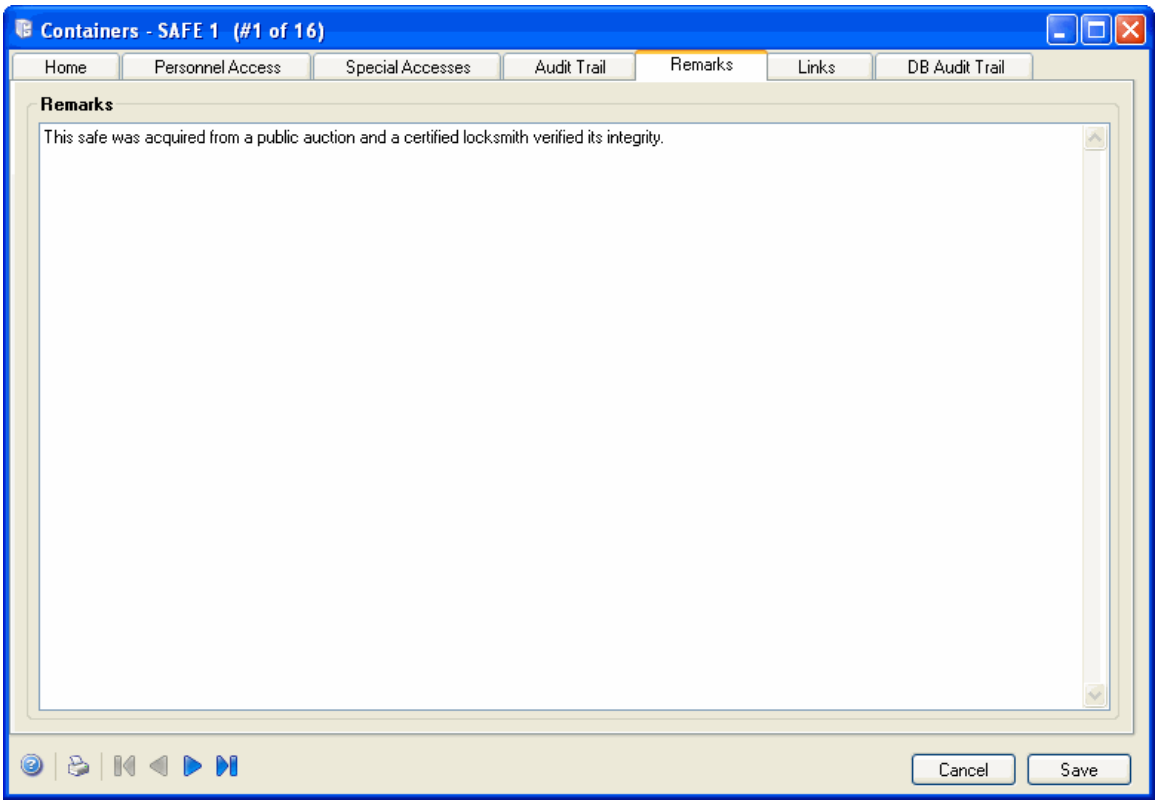


For more information about using this screen, see Input Screen.

Containers, Audit Trail Page Fields

Field Name	Description
Date	The date of the modification.
Time	The time the modification was made.
User	User ID of the person who made the change.
Changed	The date of the last combination change.
Next Change	The next scheduled date for combination change.

Containers Remarks

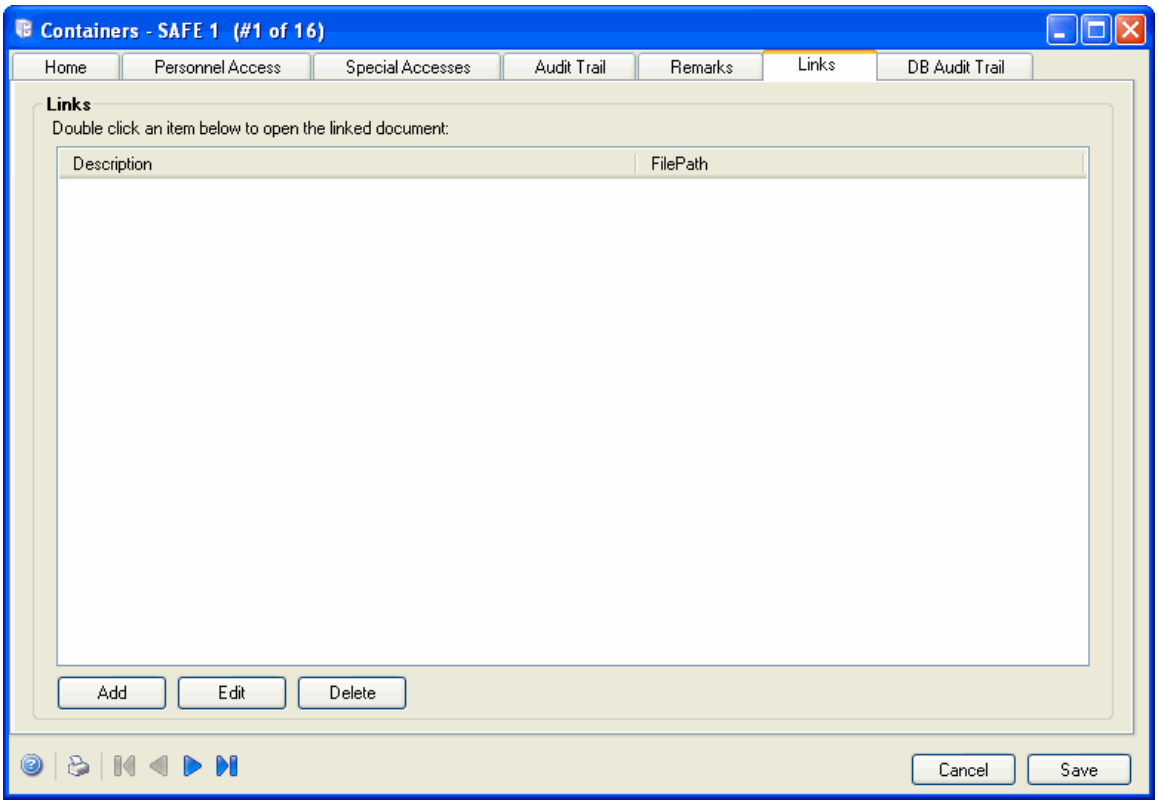


For more information about using this screen, see Input Screen.

Containers, Remarks Page Field

Field Name	Description
Remarks	Free-form textual information (up to 32kb).

Containers Links



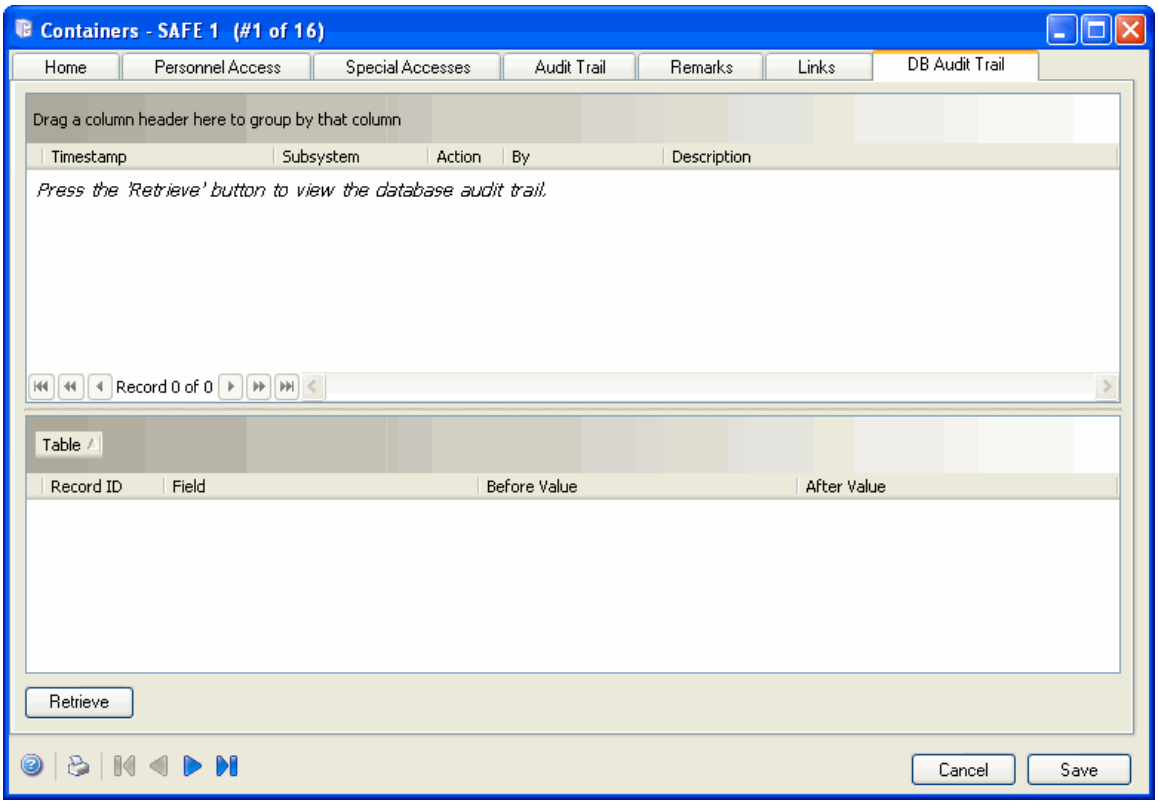
For more information about using this screen, see Input Screen.

Containers, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Containers DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Containers, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

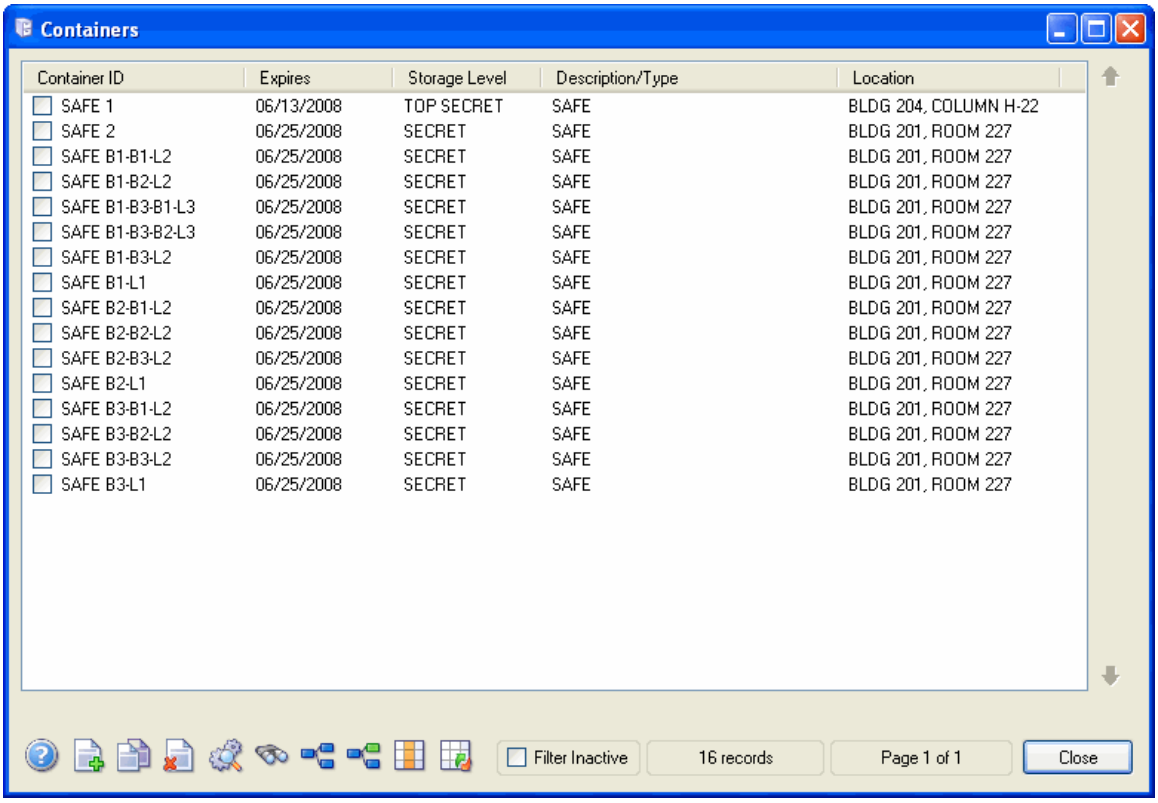
Containers List

Default Output List

The default Container Output List screen shows the Container ID, Expiration Date, Storage Level, Description/Type, and Location fields for each container record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields.


Containers
Container ID
Expires
Storage Level
Description/Type
Location
SAFE 1 06/13/2008 TOP SECRET SAFE BLDG 204, COLUMN H-22
SAFE 2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B1-B1-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B1-B2-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B1-B3-B1-L3 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B1-B3-B2-L3 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B1-B3-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B1-L1 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B2-B1-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B2-B2-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B2-B3-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B2-L1 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B3-B1-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B3-B2-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B3-B3-L2 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
SAFE B3-L1 06/25/2008 SECRET SAFE BLDG 201, ROOM 227
Filter Inactive
16 records
Page 1 of 1
Close

Filter Inactive
Check the **Filter Inactive** check box to prevent archived containers from appearing on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Containers Reports

Containers Reports

Reports Menu
For more information about the reports that appear in this module, see Standard Reports.
The rest of this page describes module-specific reports.

Containers By SA Report
This report lists the Containers associated with each special access, as defined in Utilities > Special Access Definitions.

Containers by Facility
This report lists the Containers by each facility.

Containers by Storage Levels
This report lists the Containers by each storage level.

Containers Count By SA

This report provides a count of Containers that are associated with each special access.

Containers Count by Storage Level
This report provides a count of Containers that are associated with each storage level.

Classified Contracts

Purpose of Classified Contracts

Classified Contracts maintains information for classified contracts that have been obtained or generated.

The Classified Contracts module provides a place for recording essential information on all classified contracts that the facility has obtained or generated. In addition, the Classified Contracts module area helps close out contracts, through the identification of all documents and materials that are assigned to a given contract.

Information in the Classified Contracts module is used by the following other modules:

- Classified Documents
- DoD Outgoing Requests
- DoE Outgoing Requests
- SCI Outgoing Requests
- Visitors
- Visit Authorizations

Input Screen Description
Home
Additional Info
Special Accesses
Tasks
Performing Facilities
DD254
Remarks
Links

List Screen Description
Default Output List

Reports
Reports

Terminate a Contract

When a contract ends with your facility the following steps are performed to process the termination:
Classified Documents

1. Select Classified Documents from the main SIMS screen.
2. Click **Quick Find**.
3. Enter the contract you are terminating in the **Contract ID** field.
4. Click **OK** to find all documents assigned to the contract.You now have a list of the documents assigned to the contract.
5. Now, apply Document Transactions, using any combination of the transactions listed below:
    - Transfer selected documents to another contract
    - Transfer selected documents to another facility
    - Destroy selected documents
    - Retain Until on selected documentsuntil there are no more documents assigned to the contract.

Terminate Visit Requests
If the contract has any outstanding Visit Requests, you should send a termination letter(s).

1. Go to DoD Outgoing Visit Requests.

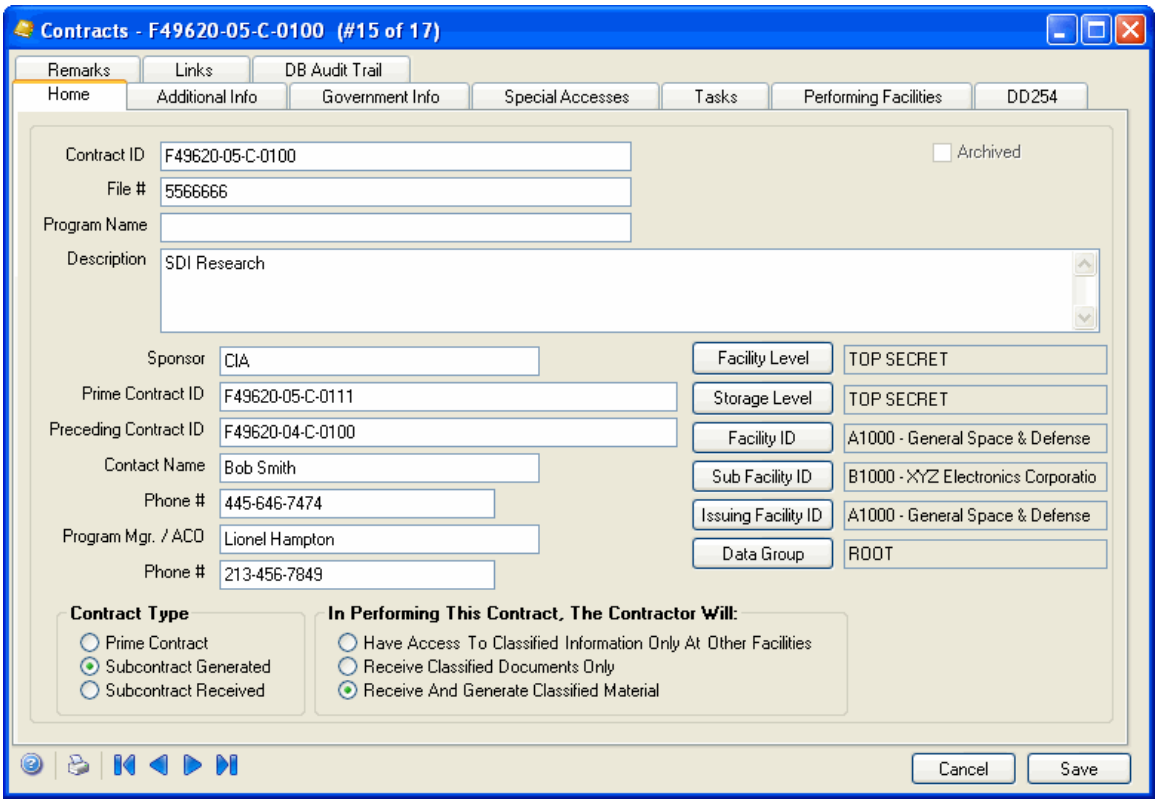
2. Click **Quick Find**.
3. Enter the contract number in the **Contract ID** field.
4. Click **OK** to get a list of all requests for the contract.
5. Select all records by highlighting them.
6. Select **Termination and Regrade Letters** from the **Reports** menu.
7. Under **Action,** select **Termination on Date**.
8. Enter the date of termination.
9. Under **Visitor Range**, select **All Visitors**. This terminates all visitors for the selected requests.
10. Fill in the **Reason** for the termination and select printing options.
11. Click **OK** and print the termination letters.

Remove Contract association from Personnel records

1. Go to Personnel.
2. Click **Query Editor**.
3. Scroll down through the list of tables and find PersonnelContracts. Expand the tree ContractID. Select **ContractID** from the list of fields and **"is equal to",** and enter the contract ID, then click **Add to Query**. Click **OK** to find all Personnel records the contract is assigned to.
4. To edit each record found, click the Contracts/Vehicles tab, and delete the contract from the list.

Classified Contracts Input

Classified Contracts Home



For more information about using this screen, see Input Screen.

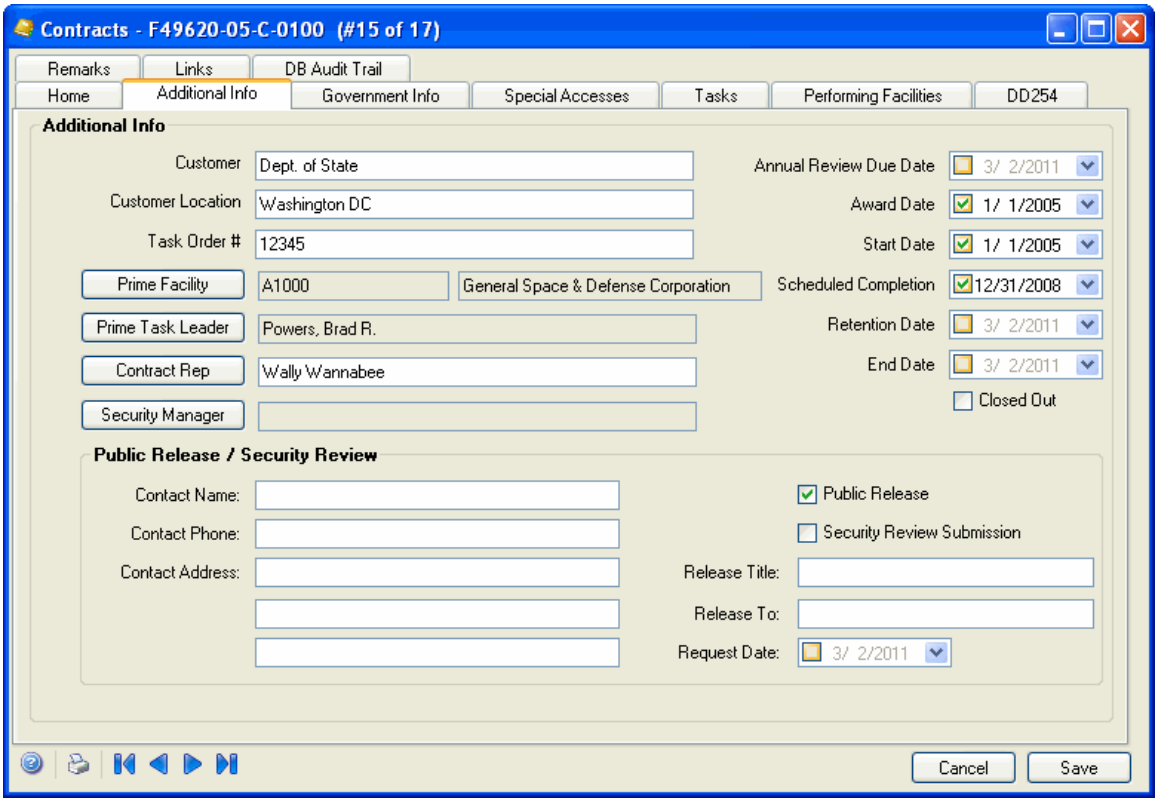
Classified Contracts, Home Page Fields

Field Name	Description

Contract ID	The Contract ID field is the primary field for Classified Contracts. Any character and/or numerical string can be used for the ID.
File #	The contract's file number, if applicable.
Archived?	Once the contract's End Date has passed or the Closed Out field is checked, the contract record will become archived.
Program Name	The contract's program name.
Description	Textual information that generally describes the nature of the procurement.
Sponsor	The contract sponsor's name.
Prime Contract ID	The prime contract number if this contract is sub-contract. If a prime contract, use the contract ID field for prime contract.
Preceding Contract ID	If this is a follow-on contract, enter the preceding contract number.
Contact Name	The point of contact's name.
Phone #	The point of contact's telephone number.
Program Mgr/ACO	The Program Manager's name if this is a subcontract, or the ACO's name if it is a prime contract.
Phone #	The second contact's telephone number.
Facility Level	The required contractor facility clearance level.
Storage Level	The required level of contractor safeguarding.
Facility ID	The contract's facility ID.
Sub Facility ID	The facility ID of the subcontractor.
Data Group	The data group that the contract belongs to. Data groups are defined in the User Management Data Groups dialog.
Contract Type	Indicate whether this is a prime contract, subcontract generated, or a subcontract received.

In Performing This Contract, The Contractor Will	Select the appropriate radio button to identify the contractor requirements and restrictions.

Classified Contracts Additional Info



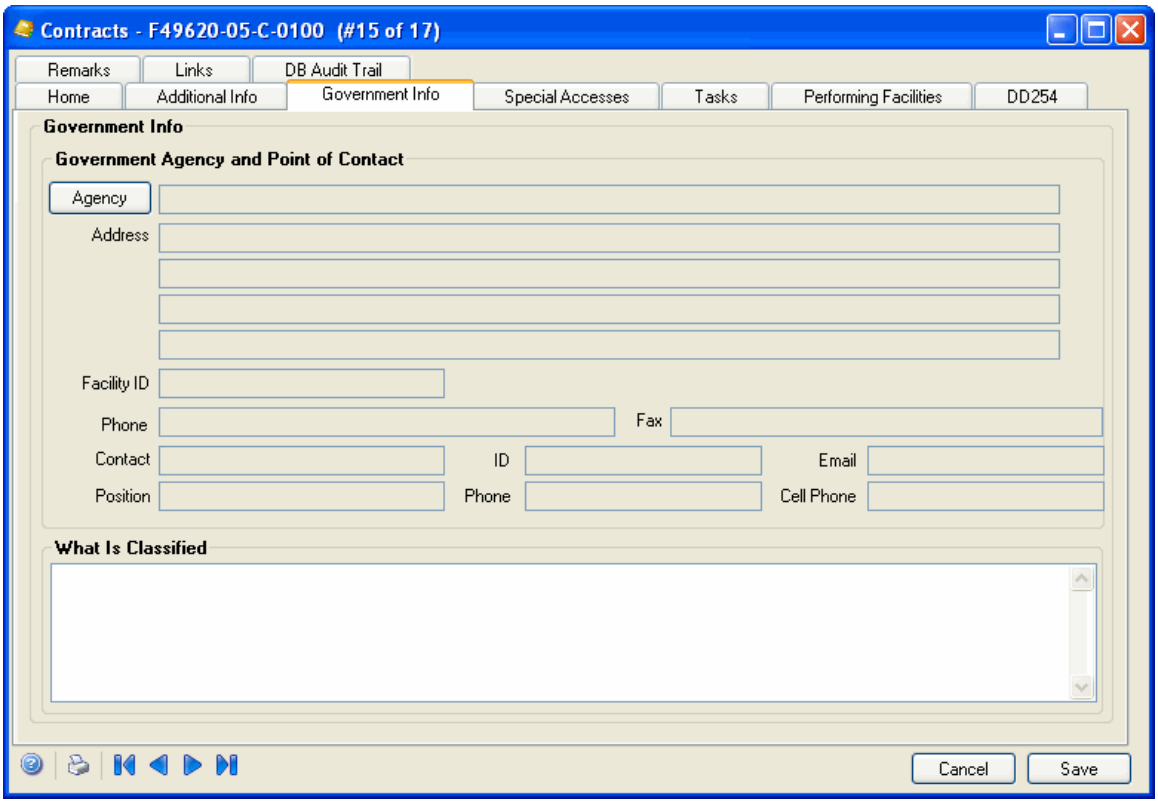
For more information about using this screen, see Input Screen.

Classified Contracts, Additional Info Page Fields

Field Name	Description
Customer	Name of the customer.
Customer Location	Location information for the customer.
Task Order #	The task order number.
Award Date	The date that the contract was awarded.
Start Date	Start date for the contract.
Scheduled Completion	The anticipated contract completion date.
Retention Date	Retention date for the contract.

End Date	End date for the contract.
Closed Out	If checked, the contract will be archived.
Prime Facility	The primary facility.
Prime Task Leader	The primary task leader.
Contract Rep	The name of the contract representative.
Security Manager	The name of the security manager.
Public Release/Security Review	The security review contact and public release information.

Classified Contracts Government Info



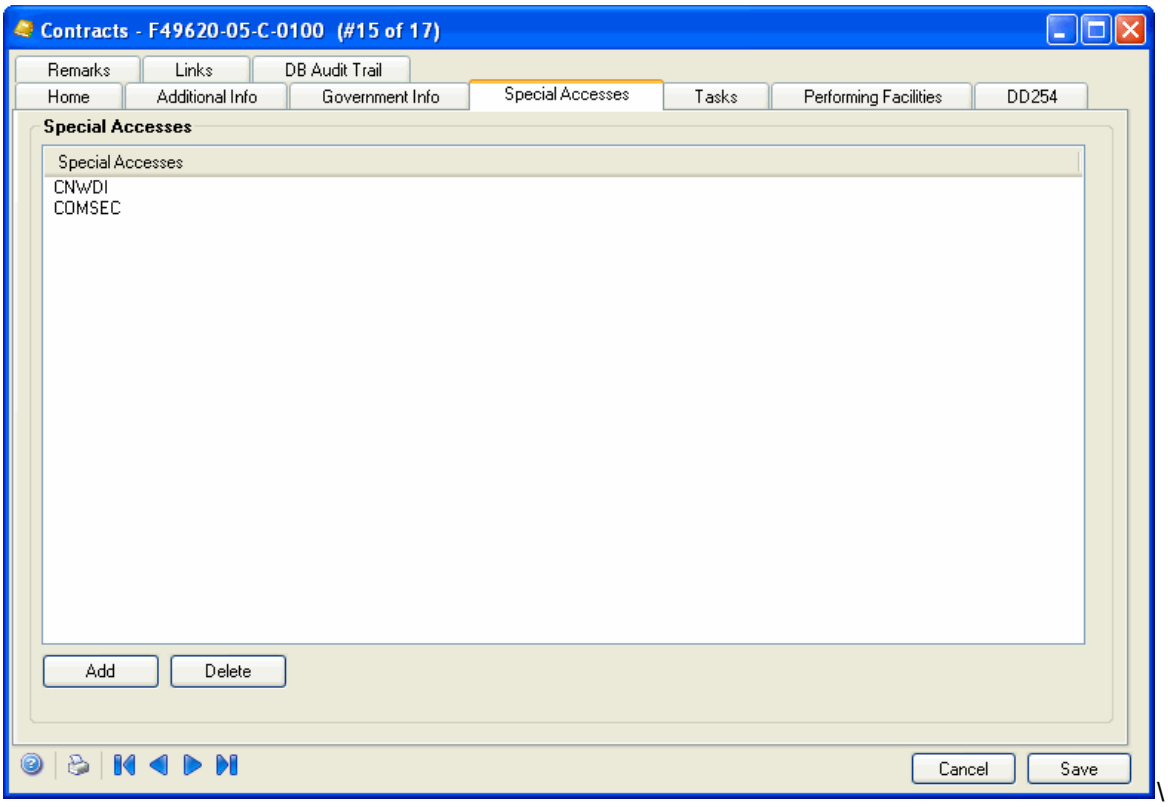
For more information about using this screen, see Input Screen.

Classified Contracts, Government Info Page Fields

Field Name	Description
Agency	The government agency.

Facility ID	The government agency's ID.
Address	The address of the government agency.
Phone	The phone number of the government agency.
Fax	The fax number of the government agency.
Contact	The contact person of the government agency.
ID	The contract person's ID.
Email	The contract person's email
Position	The contract person's position.
Phone	The contract person's phone number.
Cell Phone	The contract person's cell phone number.
What is Classified	Textual information that describes what is classified.

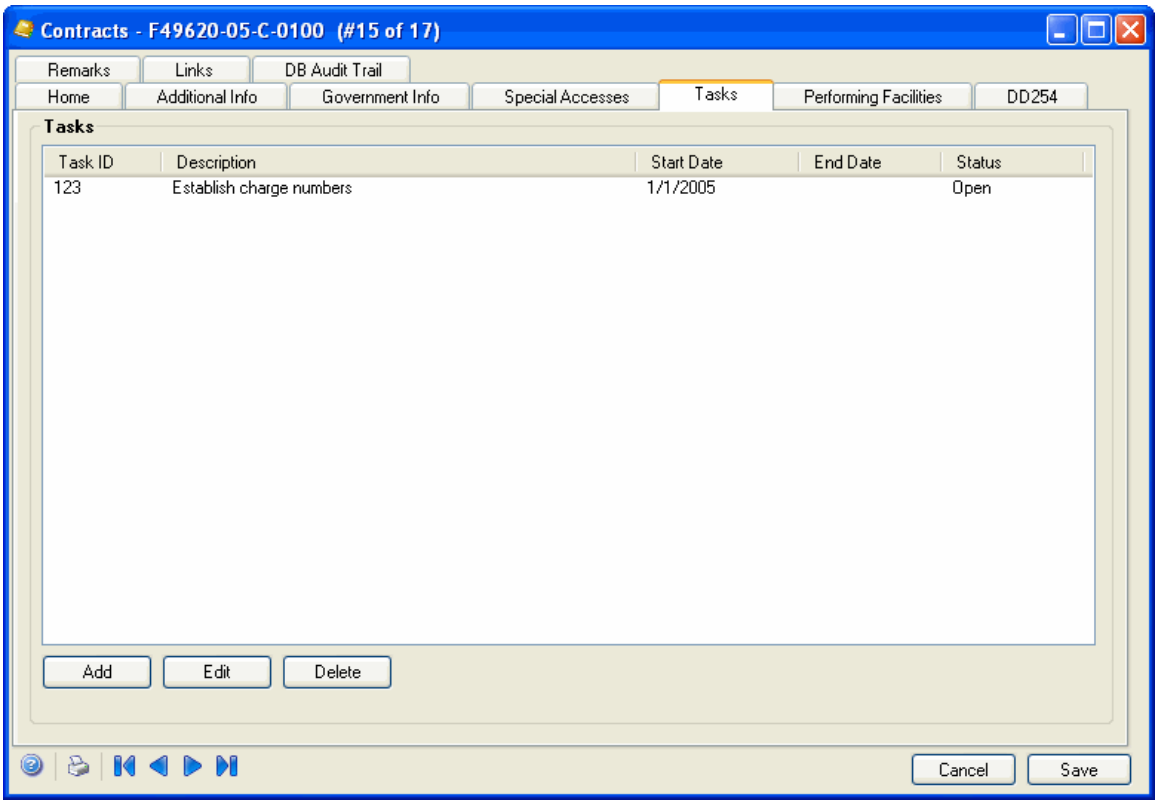
Classified Contracts Special Accesses



For more information about using this screen, see Input Screen.
Classified Contracts, Special Accesses Page Fields

Field Name	Description
Special Accesses	Any special accesses required for this contract. Special Accesses are defined in Utilities -> Special Access Definitions.

Classified Contracts Tasks



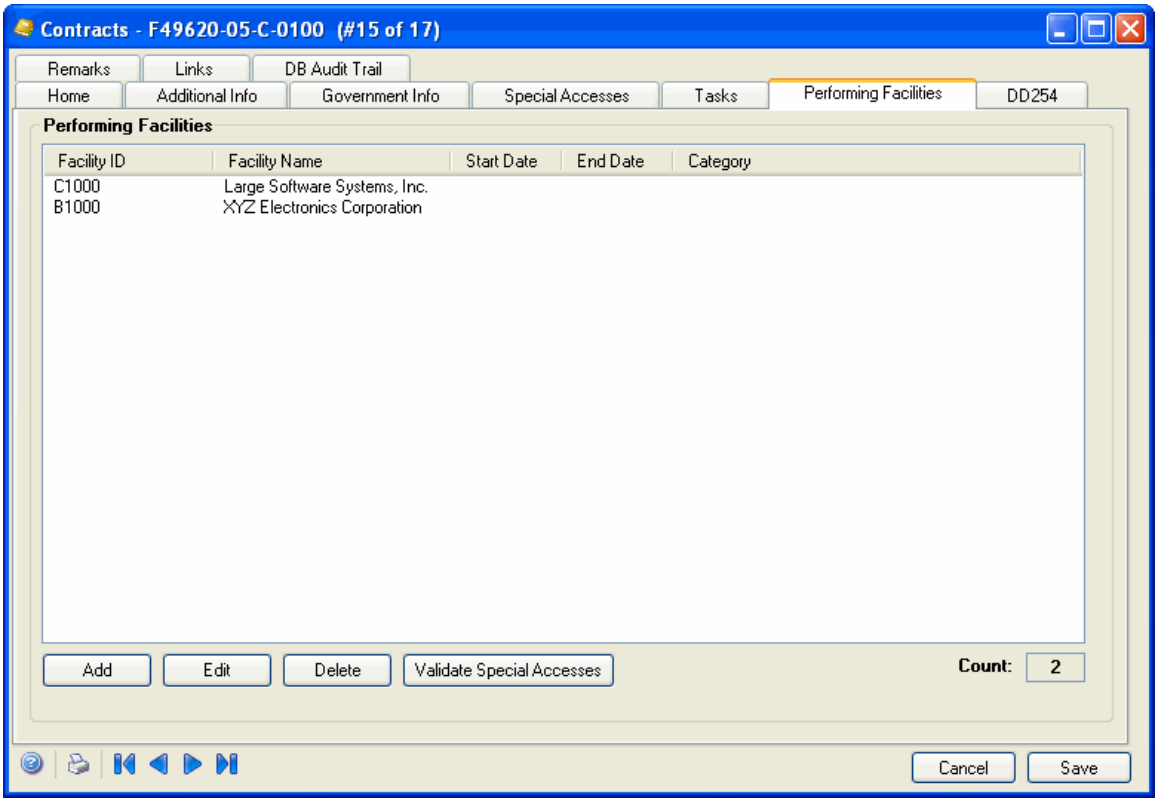
For more information about using this screen, see Input Screen.
Classified Contracts, Task Input Page Fields

Field Name	Description
Task ID	The ID for the task.
Description	Title or brief description of the task.
Start Date	Date the task begins.
End Date	Date the task ends.

Status	Status of the task.
Remarks	Task notes.

Classified Contracts Performing Facilities

Classified Contracts Performing Facilities

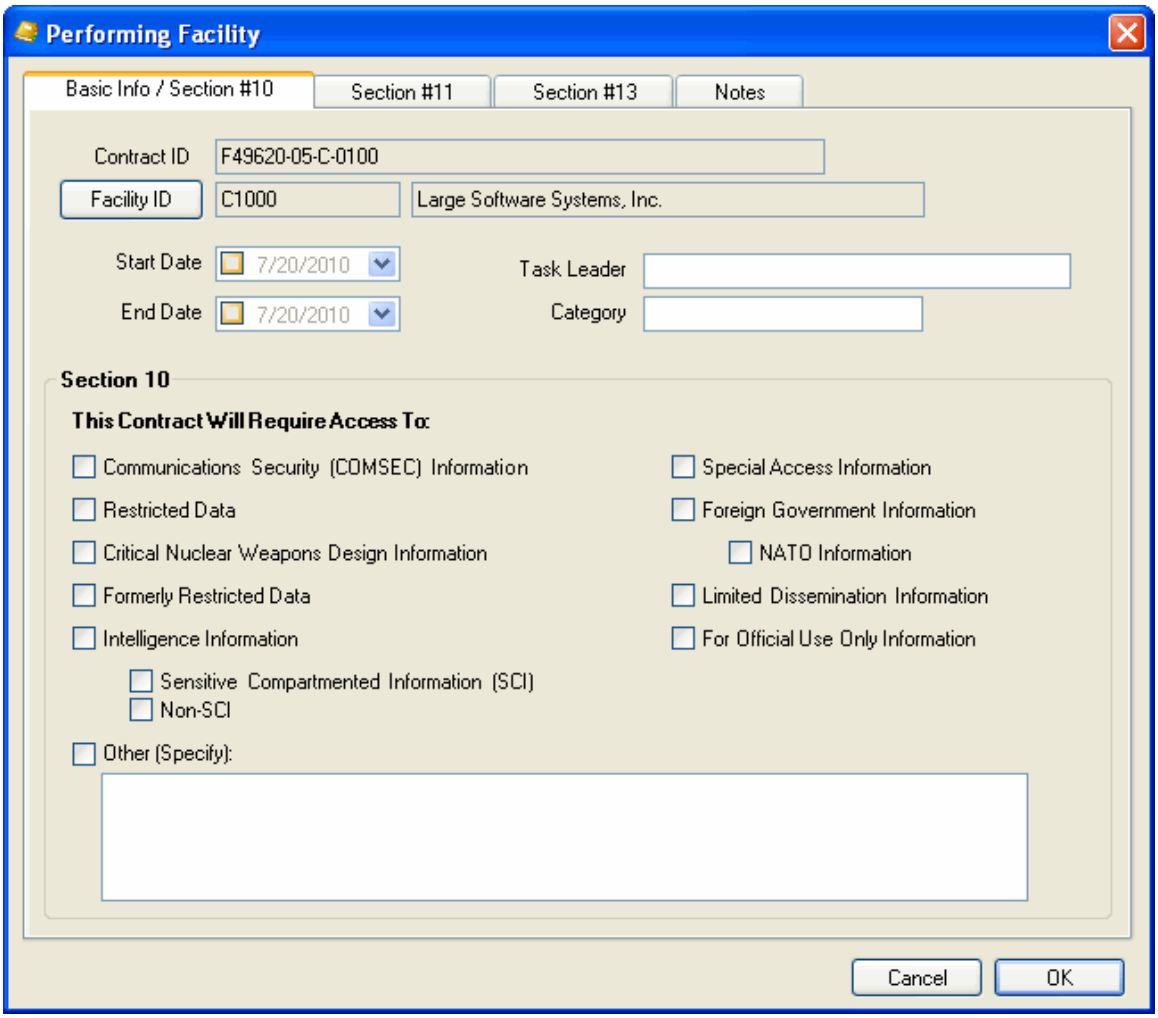


For more information about using this screen, see Input Screen.

Classified Contracts, Performing Facilities Page Fields

Field Name	Description
Facility ID	The contract's facility ID.
Start Date	Start date for the facility for this contract.
End Date	End date for the facility for this contract.
Category	Role of the facility or task leader for the facility.

Classified Contracts Performing Facilities Basic Info/Section 10



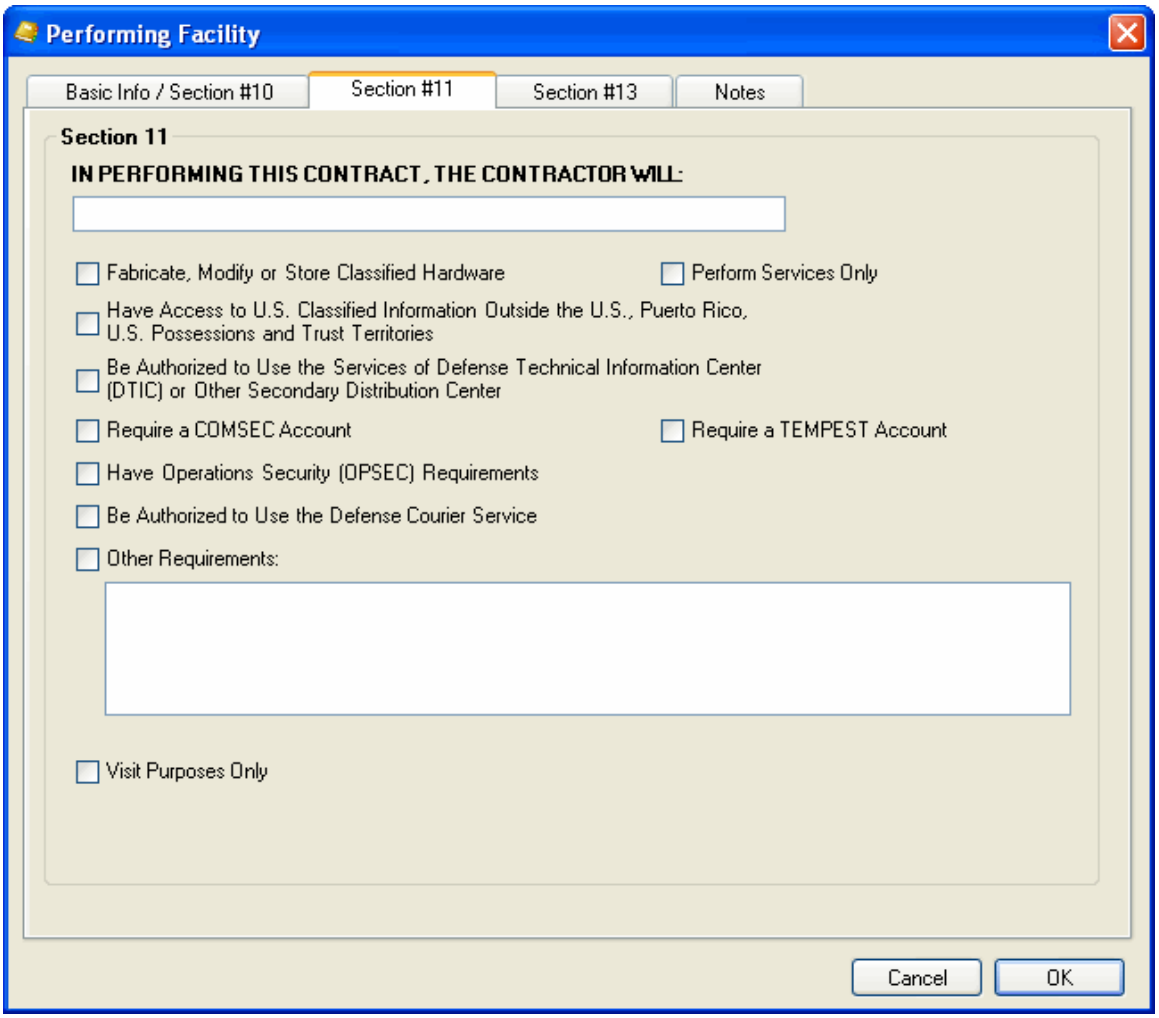
For more information about using this screen, see Input Screen.

Classified Contracts, Performing Facilities Basic Info/Section 10 Page Fields

Field Name	Description
Contract ID	The contract number.
Facility ID	The facility ID and name that is performing the contract.
Start Date	The beginning date.
End Date	The end date.
Task Leader	The point of contact at the facility for the contract.
Category	Role of the facility or task leader on the contract.

Section 10	Click on the appropriate check boxes to identify the required accesses. If 'Other' is selected, enter other access information in the text box. This info is from the DD254.

Classified Contracts Performing Facilities Section 11


Performing Facility
Basic Info / Section #10
Section #11
Section #13
Notes
Section 11
IN PERFORMING THIS CONTRACT, THE CONTRACTOR WILL:
Fabricate, Modify or Store Classified Hardware
Perform Services Only
Have Access to U.S. Classified Information Outside the U.S., Puerto Rico, U.S. Possessions and Trust Territories
Be Authorized to Use the Services of Defense Technical Information Center (DTIC) or Other Secondary Distribution Center
Require a COMSEC Account
Require a TEMPEST Account
Have Operations Security (OPSEC) Requirements
Be Authorized to Use the Defense Courier Service
Other Requirements:
Visit Purposes Only
Cancel
OK

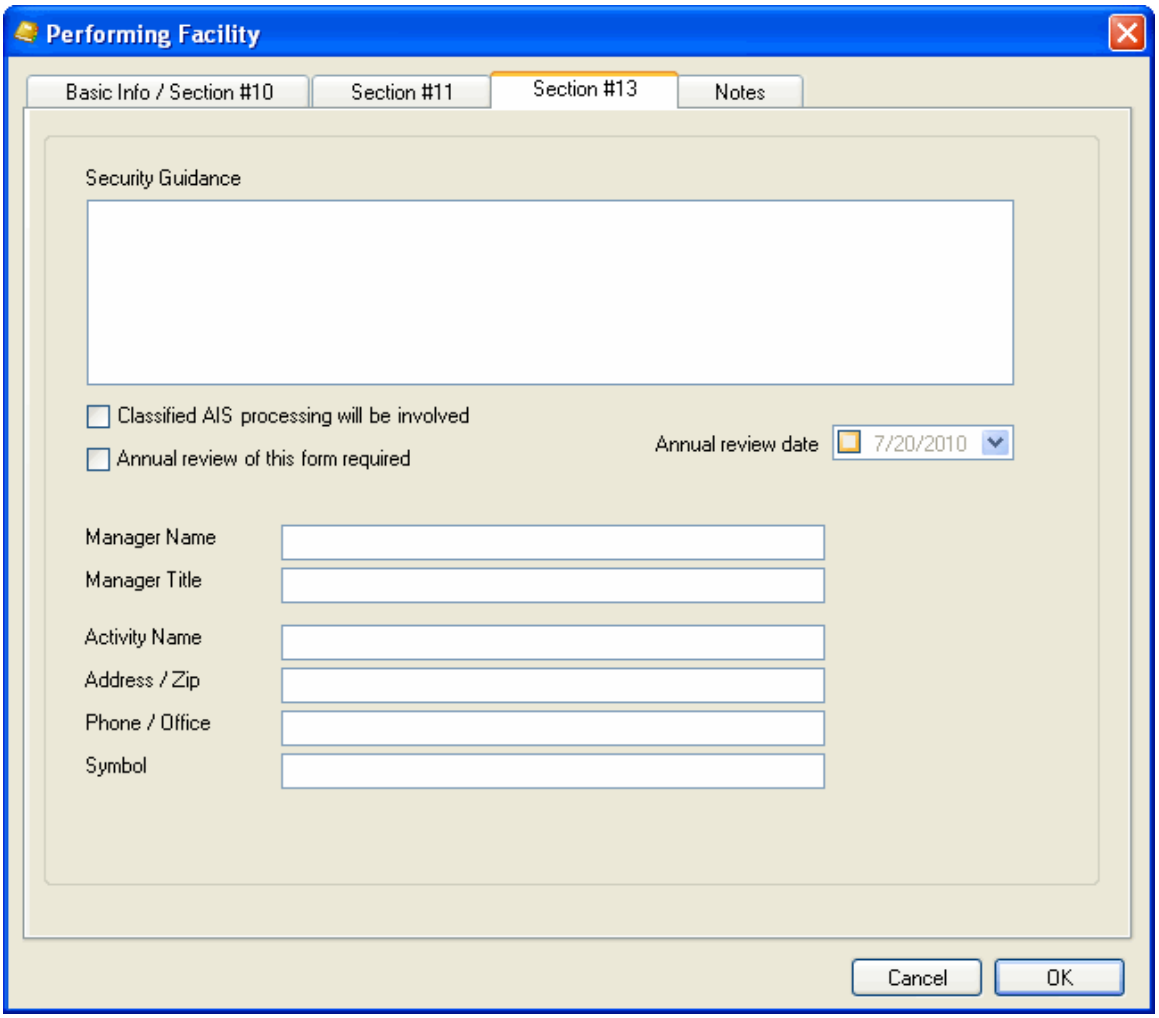
For more information about using this screen, see Input Screen.

Classified Contracts, Performing Facilities Section 11 Page Fields

Field Name	Description
Visit Purpose Only	Check if visiting only.
In Performing This Contract, The Contractor Will:	Enter performance information in the text box.

Section 11	Click on the appropriate check boxes to identify the contractor requirements and restrictions. If 'Other Requirements' is selected, enter other performance information in the text box. This info is from the DD254.

Classified Contracts Performing Facilities Section 13



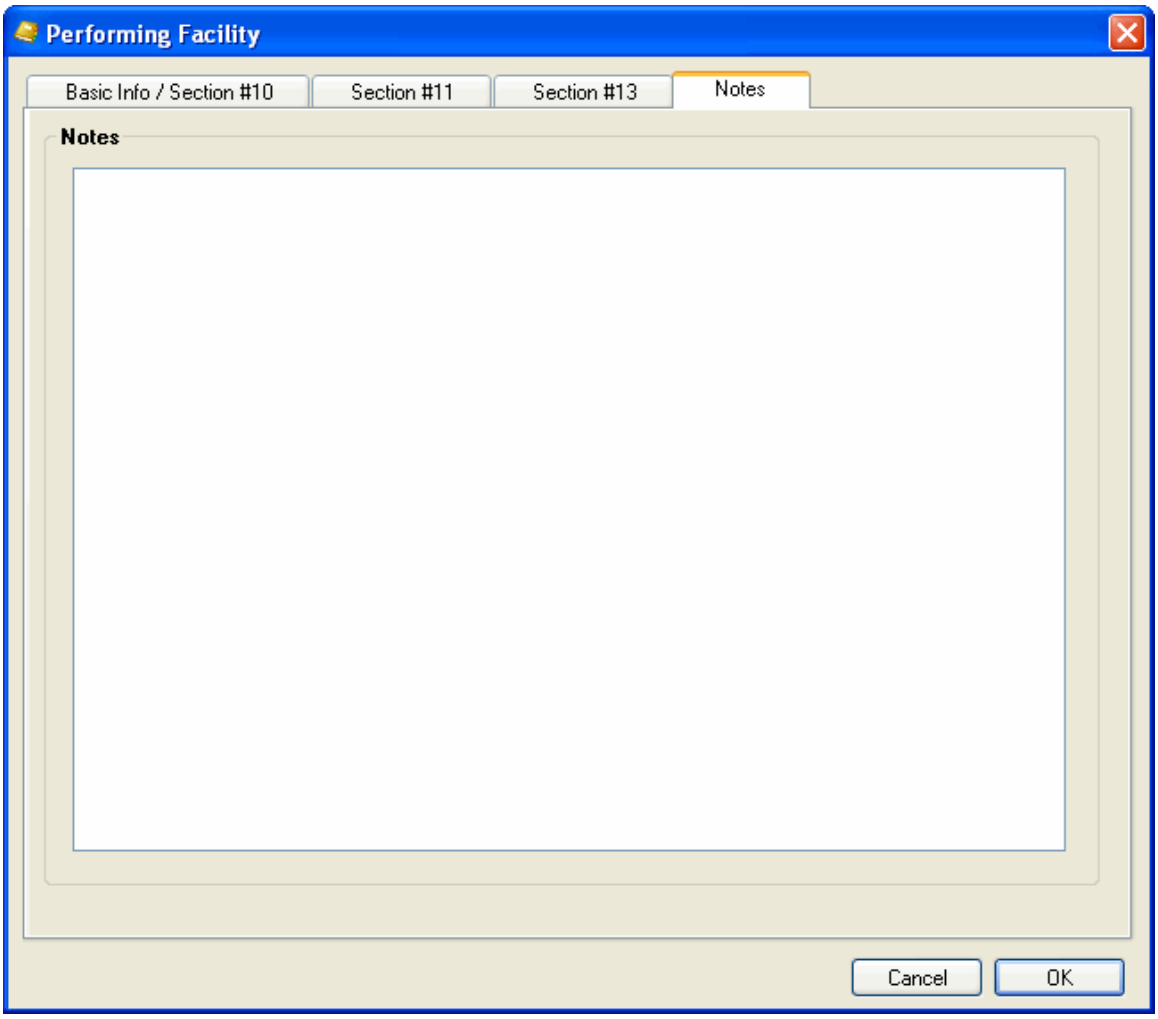
For more information about using this screen, see Input Screen.

Classified Contracts, Performing Facilities Section 13 Page Fields

Field Name	Description
Security Guidance	This is a free-form textual field for specification of any security guidance. Additional pages will be printed, as required.
Classified AIS Processing Will Be Involved	If AIS processing is required for the contract and is classified, check this box.

Annual Review of This Form Required	If the form must be reviewed on an annual basis, check this box.
Annual Review Date	Enter the date when this contract is next scheduled to be reviewed. Note that this date is not printed on the DD Form 254 but is used by the contract audit report.
Manager Name	Enter the name of the individual whose signature will appear below block 13.
Manager Title	Enter the title of the individual whose signature will appear below block 13.
Activity Name	Enter the name of the activity.
Address / Zip	Enter the address and zip code of the activity.
Phone / Office	Enter the phone number and office of the activity.
Symbol	Enter the symbol of the activity.

Classified Contracts Performing Facilities Notes



For more information about using this screen, see Input Screen.

Classified Contracts, Performing Facilities Notes Page Fields

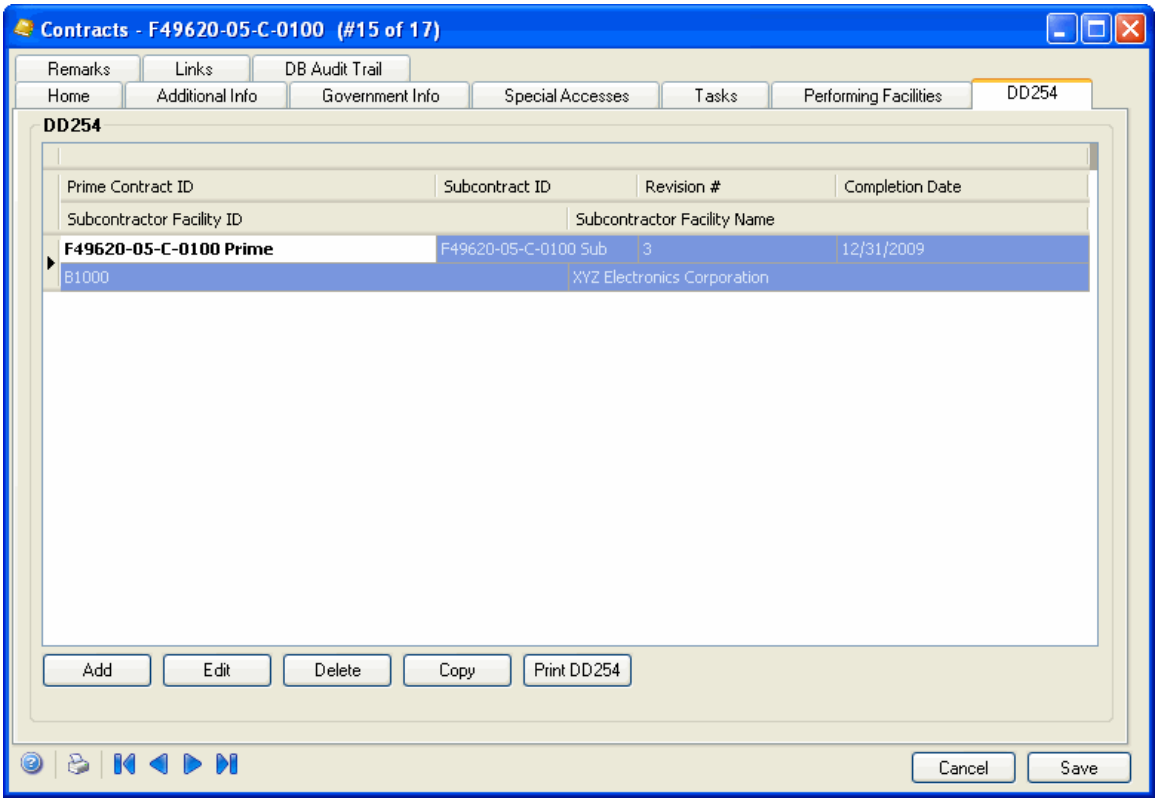
Field Name	Description
Notes	Notes area for this facility.

Classified Contracts DD254

Classified Contracts DD254

Input Screen Description

Section 1-5
Section 6-8
Section 9-10
Section 11
Section 12-13
Section 14-16
Section 17

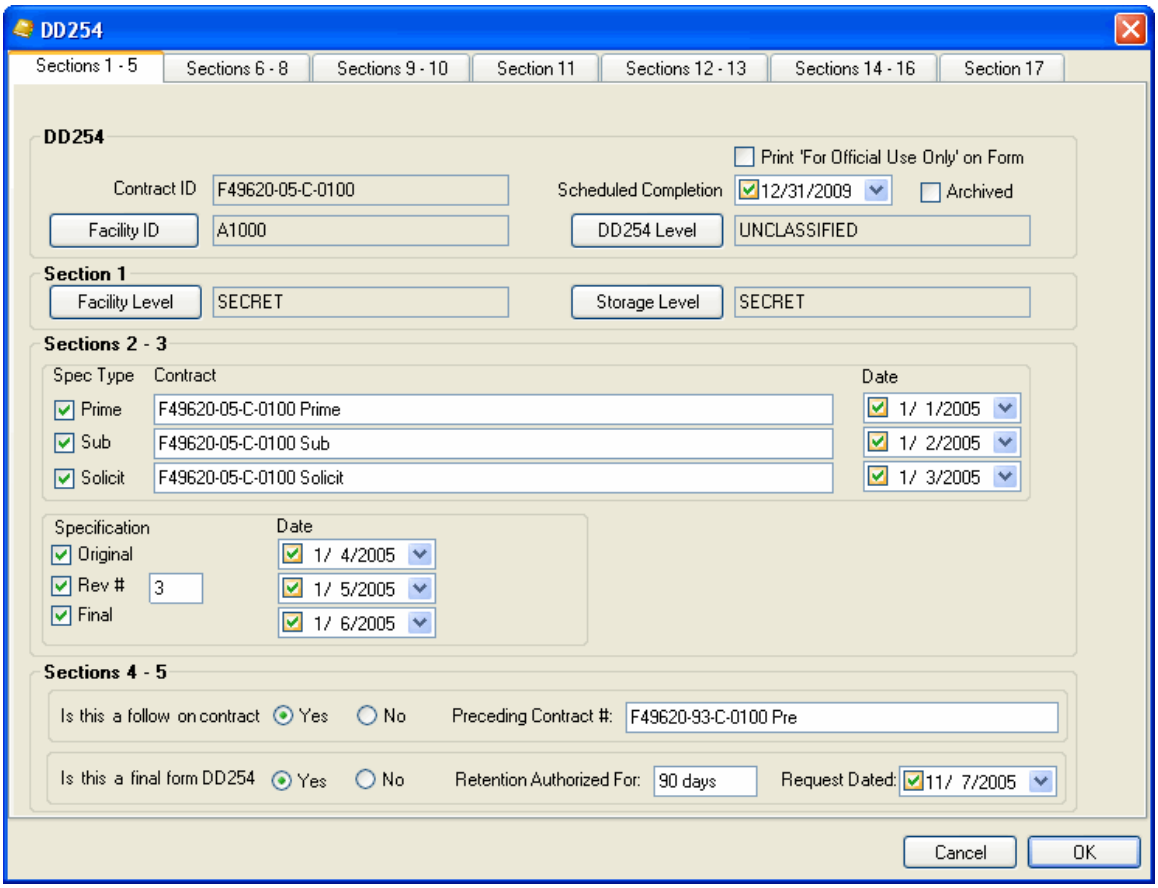


For more information about using this screen, see Input Screen.

Classified Contracts, DD254 Page Fields

Field Name	Description
Prime Contract ID	Primary contract identification.
Subcontract ID	Subcontract identification.
Revision #	The revision number.
Completion Date	The completion date.
Subcontractor Facility ID	Subcontract facility identification.
Subcontractor Facility Name	The name of the subcontractor facility selected in the Section 6 - 8 tab of the DD254 record.
Print DD254	Highlight the Form DD254 record to be printed, then click on the Print DD254 button.

Classified Contracts DD254 Section 1-5



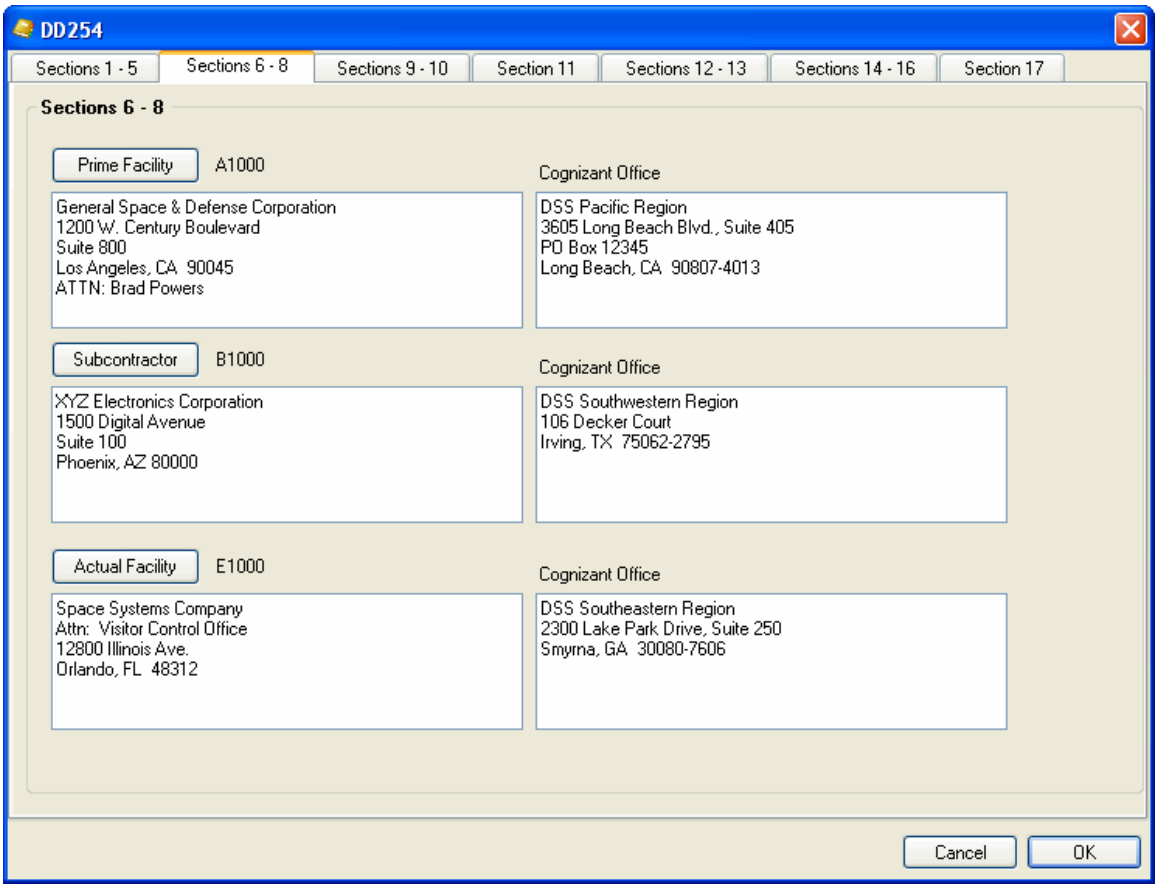
For more information about using this screen, see Input Screen.

DD 254, Section 1-5 Page Fields

Field Name	Description
Print for 'Official Use Only' on Form	If checked, 'Official Use Only' will appear in the header and footer sections of the printed form.
Contract ID	The Contract ID information appears here.
Facility ID	Click to select the facility identification number.
DD254 Level	If the completed DD Form 254 is a classified document, select the appropriate classification level for the form.
Scheduled Completion	The date the contract is anticipated to be completed.
Archived	If checked, the contract is considered "archived" and no longer active.
Facility Level	The required contractor facility clearance level for the contract.

Storage Level	The required level of contractor safeguarding for the contract.
Spec Type	Select one or more to activate the contract type: Prime, Sub(contract), or Solicit(ation)
Contract	The contract numbers for the prime contracts, subcontracts, and solicitations.
Spec - Date	Select to activate and edit the contract date for each contract type. Note that the dates associated with prime contracts and subcontracts do not appear on the printed DD Form 254. However, these dates are used by SIMS for the contract audit report in the Database Audits utility. The Due Date that is printed on the DD Form 254 is actually the date that appears next to the **S olicit** field.
Specification	Select one or more to indicate whether the contract is an Orig(inal), Rev(ised), or Final. Enter the revision number if it is a revised contract.
Date	Select to activate and edit the contract date for each contract specification type.
Is This a Follow On Contract?	Indicate if the contract is a follow on contract.
Preceding Contract #	Enter the previous contract number if the contract is a follow on contract.
Is This a Final DD Form 254?	Indicate if this is a Final DD254 Form.
Retention Authorized For	If this is not a Final DD254 Form, enter what the retention is authorized for.
Requested Date	If this is not a Final DD254 Form, enter the retention period authorized.

Classified Contracts DD254 Section 6-8

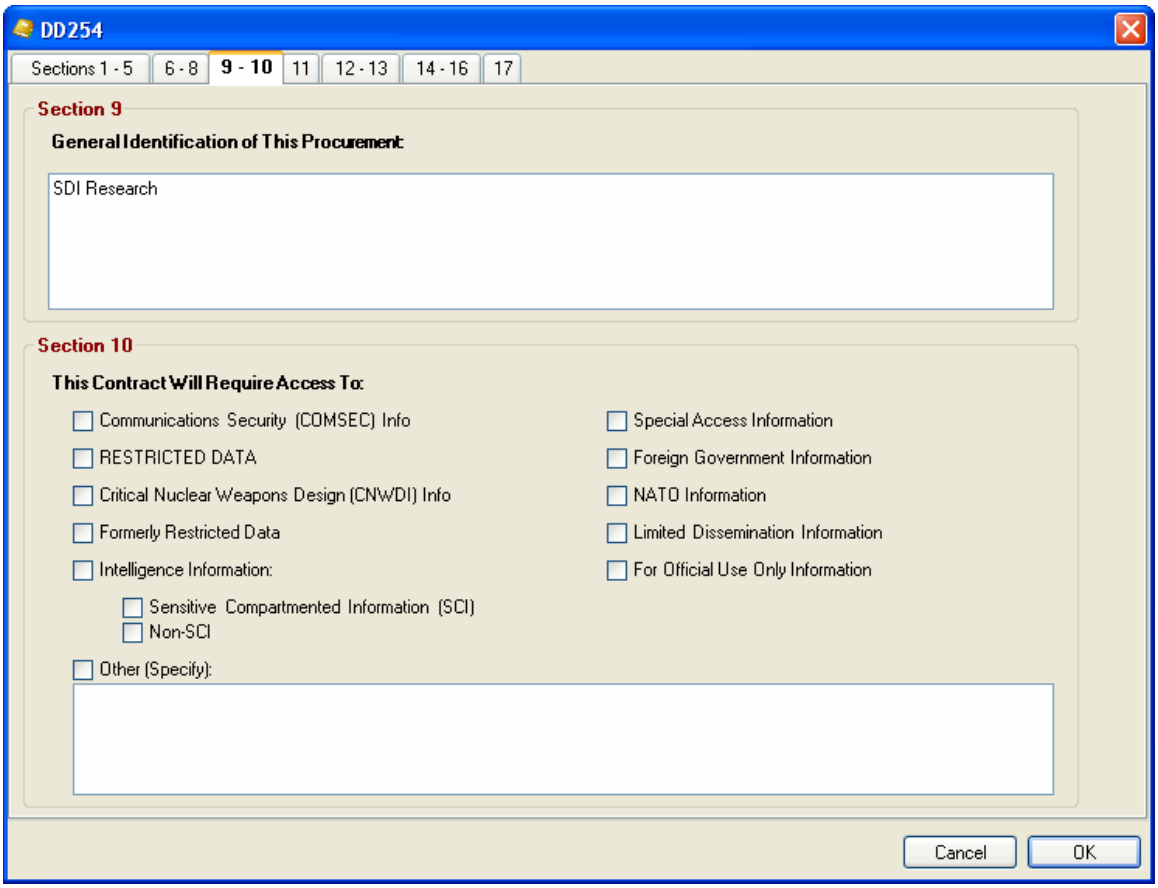


For more information about using this screen, see Input Screen.

DD 254, Section 6-8 Page Fields

Field Name	Description
Prime Facility	Click to select the prime facility.
Cognizant Office	The Cognizant Office information will automatically be completed when the Prime, Subcontractor, or Actual facility is specified.
Subcontractor	Click to select the subcontractor facility, if applicable.
Actual Facility	Click to select the facility where the work will actually be performed, if applicable and if it is other than the prime or subcontractor's facility.

Classified Contracts DD254 Section 9-10

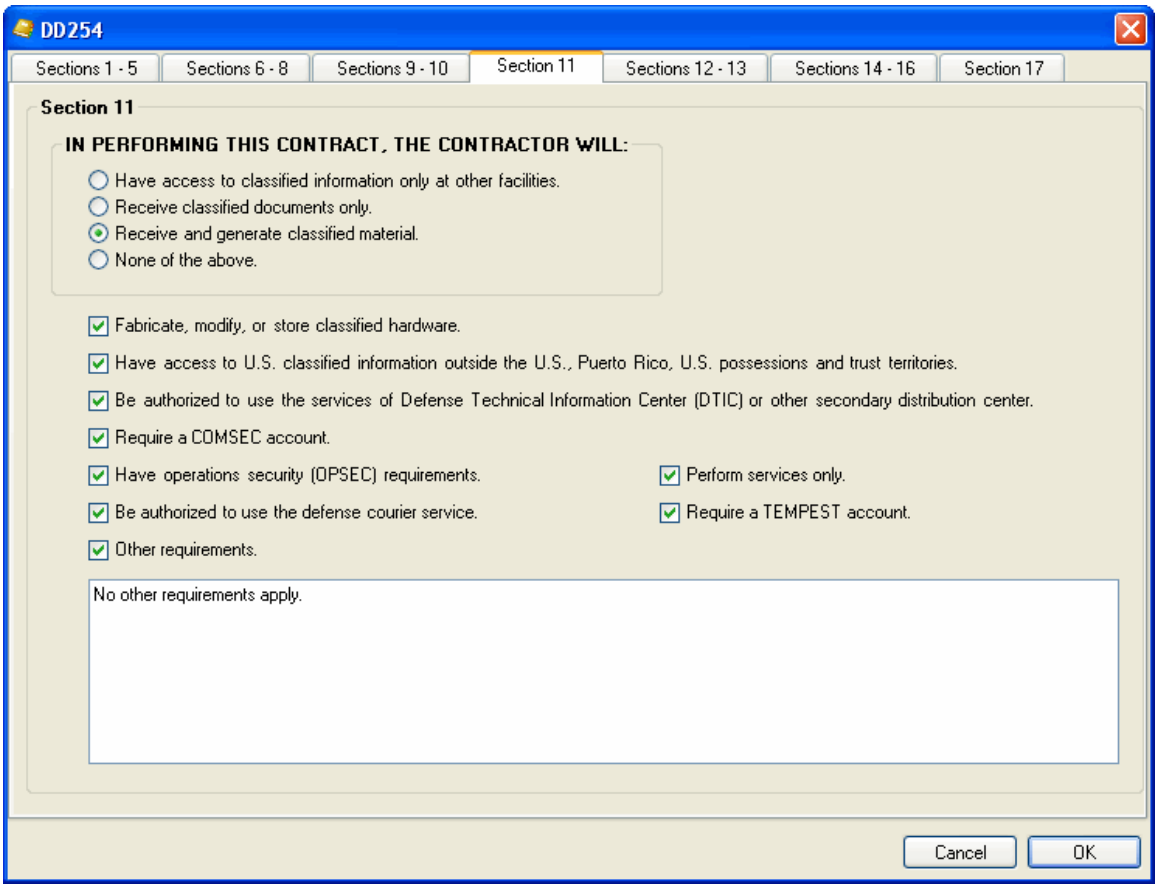


For more information about using this screen, see Input Screen.

DD 254, Section 9-10 Page Fields

Field Name	Description
General Identification of the Procurement	Textual information that describes the nature of the procurement.
This Contract will Require Access to:	Check the appropriate boxes to identify the required accesses. If the 'Other' option is selected, specify the other required accesses.

Classified Contracts DD254 Section 11

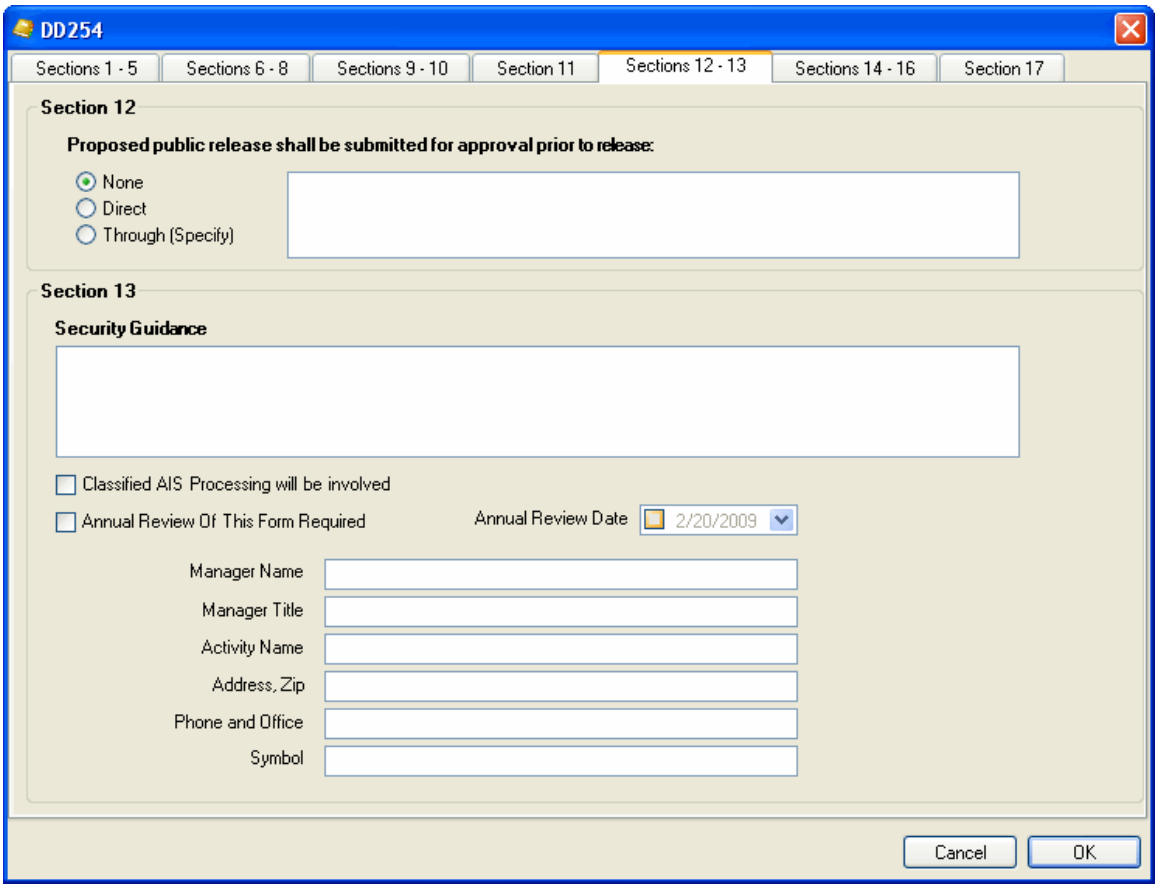

DD254
Sections 1 - 5
Sections 6 - 8
Sections 9 - 10
Section 11
Sections 12 - 13
Sections 14 - 16
Section 17
Section 11
IN PERFORMING THIS CONTRACT, THE CONTRACTOR WILL:
Have access to classified information only at other facilities.
Receive classified documents only.
Receive and generate classified material.
None of the above.
Fabricate, modify, or store classified hardware.
Have access to U.S. classified information outside the U.S., Puerto Rico, U.S. possessions and trust territories.
Be authorized to use the services of Defense Technical Information Center (DTIC) or other secondary distribution center.
Require a COMSEC account.
Have operations security (OPSEC) requirements.
Perform services only.
Be authorized to use the defense courier service.
Require a TEMPEST account.
Other requirements.
No other requirements apply.
Cancel
OK

For more information about using this screen, see Input Screen.

DD 254, Section 11 Page Fields

Field Name	Description
In Performing this Contract, the Contractor:	Check the appropriate boxes to identify the contractor requirements and restrictions. If the 'Other' requirements option is selected, specify those requirements in the text box.

Classified Contracts DD254 Section 12-13



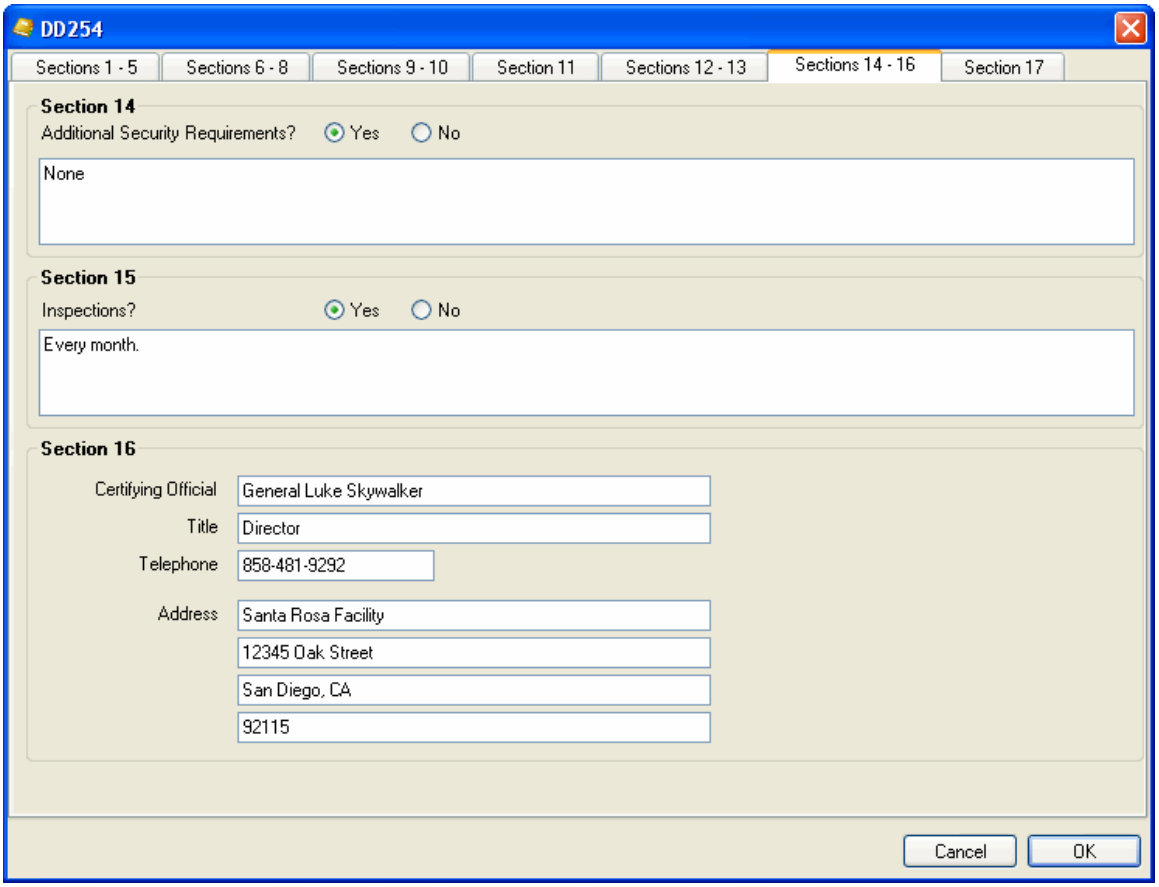
For more information about using this screen, see Input Screen.

DD 254, Section 12-13 Page Fields

Field Name	Description
Proposed Public Release...	Select the proposed method of public release. If 'Through' is selected, enter the proposed public release methodology in the text box.
Section 13 (Security Guidance)	A free-form textual field for specification of any security guidance. Additional pages will be printed as required.
Classified AIS Processing Will Be Involved	Check this box if AIS processing is required for the contract and is classified.
Annual Review of This Form Required	Check this box if the form must be reviewed on an annual basis.
Annual Review Date	The date when this contract is next scheduled to be reviewed. Note that this date is not printed on the DD Form 254 but is used by the contract audit report.
Manager Name	The name of the individual whose signature will appear below Section 13.

Manager Title	The title of the individual whose signature will appear below Section 13.
Activity Name	Name for the responsible activity.
Address, Zip	Address and zip code for the responsible activity.
Phone, and Office	Phone number and office for the responsible activity
Symbol	Symbol for the responsible activity.

Classified Contracts DD254 Section 14-16



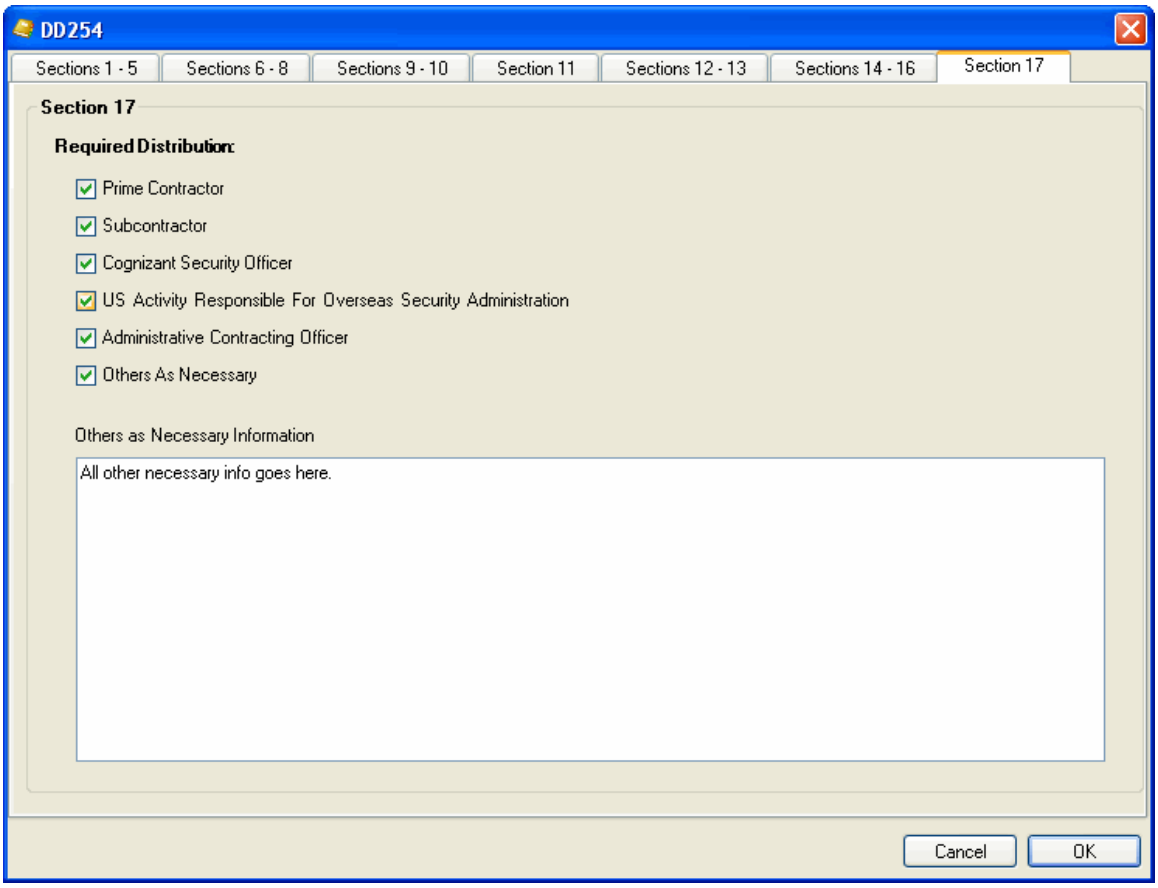
For more information about using this screen, see Input Screen.

DD 254, Section 14-16 Page Fields

Field Name	Description
Additional Security Requirements?	If 'Yes' is checked, enter a statement that identifies the additional requirements.

Inspections?	If 'Yes' is checked, elements of this contract are outside the inspection responsibility of the cognizant security office. Enter the specific areas or elements carved out and the activity responsible for inspections.
Certifying Official	Enter the name of the Contracting Officer for security matters, certifying that the security requirements are complete and adequate for performance of the classified effort.
Title	Enter the title of the Contracting Officer.
Telephone	Enter the telephone number of the Contracting Officer.
Address	Enter the address of the Contracting Officer.

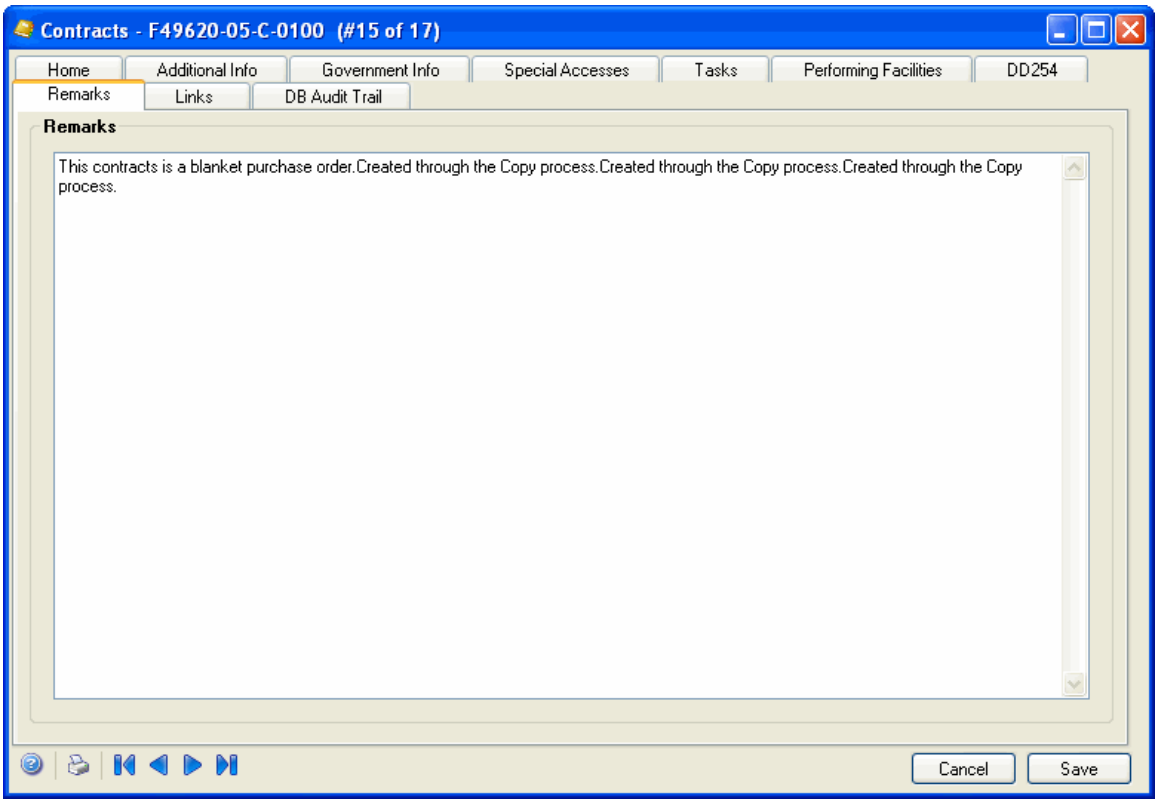
Classified Contracts DD254 Section 17



For more information about using this screen, see Input Screen.
DD 254, Section 17 Page Fields

Field Name	Description
Required Distribution	Check the appropriate boxes to specify the required distribution of this DD Form 254. If the 'Others as Necessary' option is selected, specify the additional distribution in the text box.

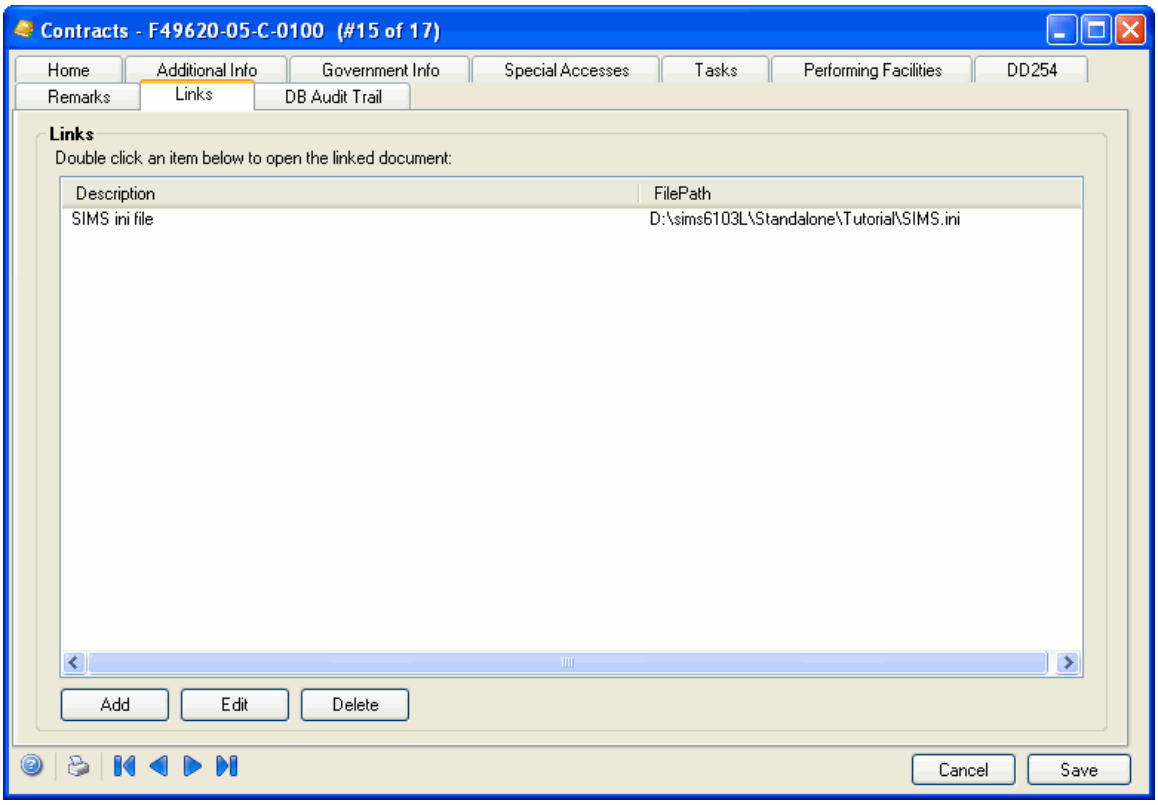
Classified Contracts Remarks



For more information about using this screen, see Input Screen.
Classified Contracts, Remarks Page Fields

Field Name	Description
Remarks	Enter free-form textual information (up to 32k bytes of text).

Classified Contracts Links



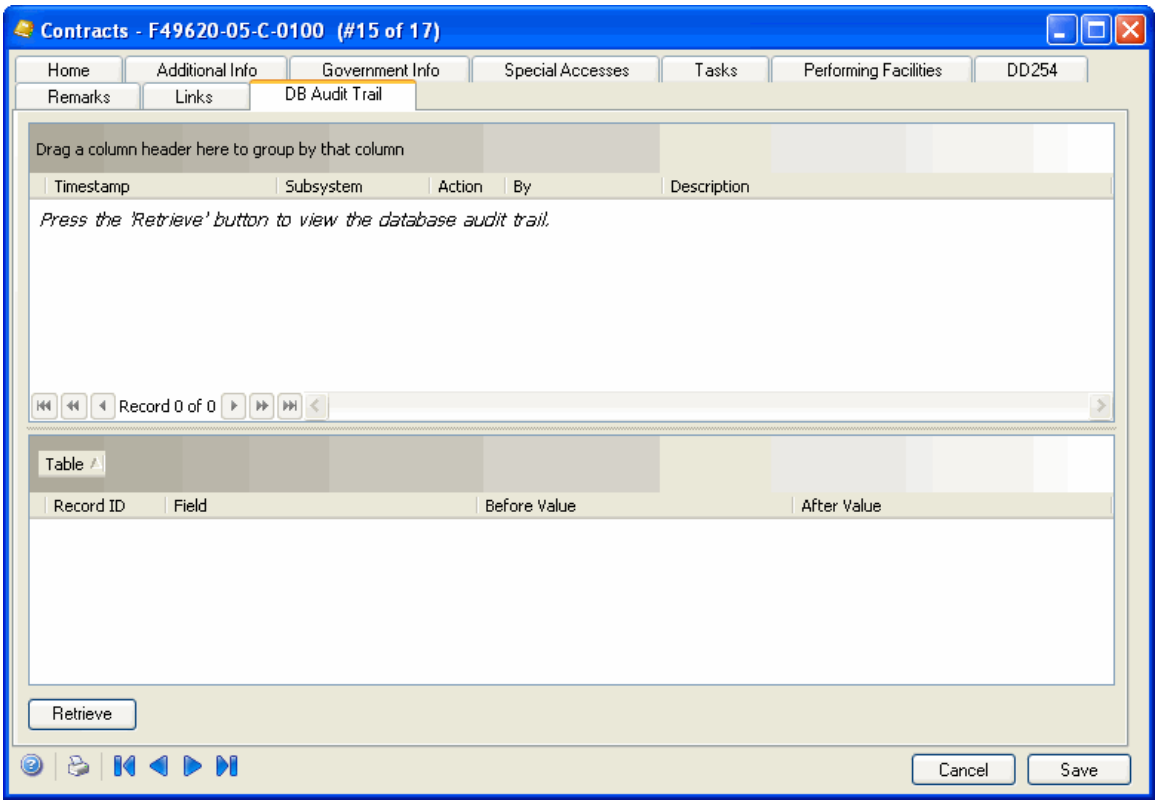
For more information about using this screen, see Input Screen.

Classified Contracts, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Classified Contracts DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Classified Contracts, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

Classified Contracts List

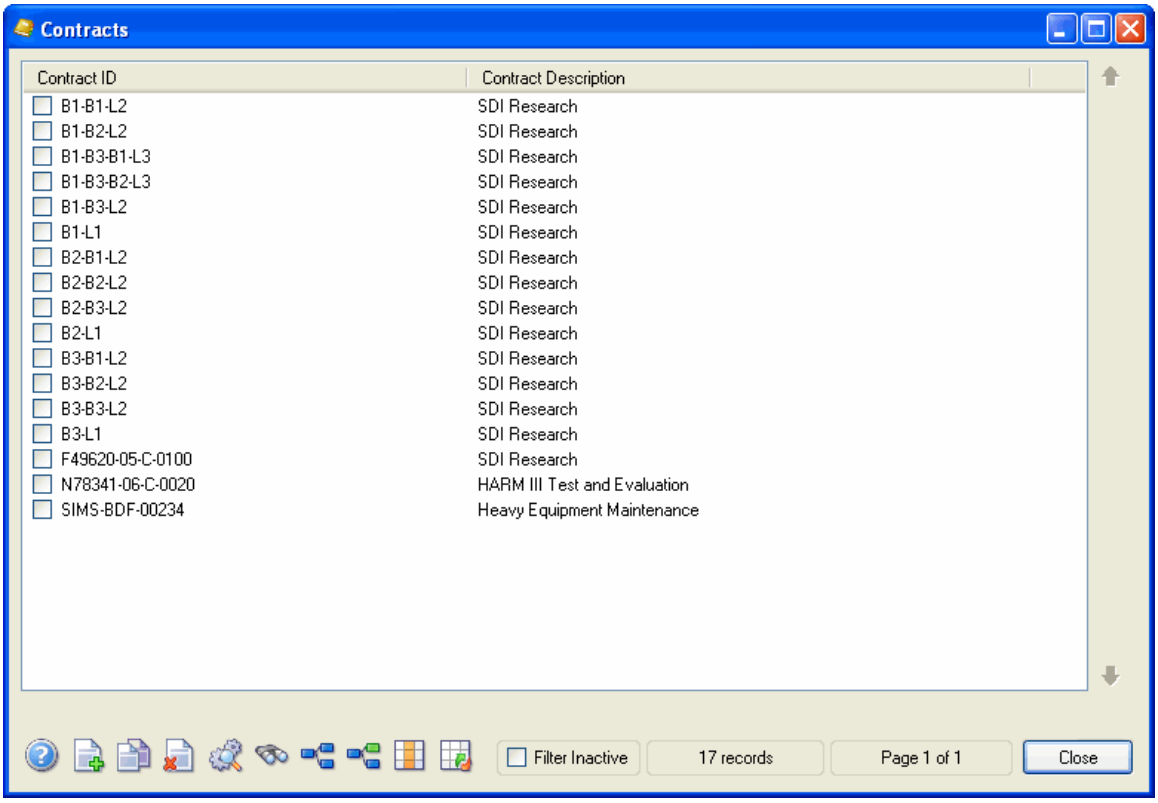
Default Output List Screen

The Classified Contracts default output list screen shows the Contract ID and Contract Description fields for each record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.

- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** check box to prevent archived contracts from appearing on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Classified Contracts Reports

Reports Menu
For more information about the reports that appear in this module, see Standard Reports.

To print a Form DD254, the contract record must first be selected from the Output List screen, then record must then be opened by double clicking on the record entry, next select the DD254 tab and highlight the DD254 record to be printed, then click on the Print DD254 button.

Classified Documents

Purpose of Classified Documents

Classified Documents maintains information for all classified documents, magnetic tapes, floppy diskettes, hardware, etc. at a facility.

The Classified Documents module manages information concerning all classified documents, magnetic tapes, floppy diskettes, hardware, etc. at a facility. Document number, title, classification, custodian, location, author, and contract are among the items contained in the Classified Documents module. Classified Documents also handles loaning and transferring documents both within the facility (e.g., between custodians and between contracts) and outside the facility, as well as the destruction of documents. All significant actions connected with a document are recorded while it exists at the facility. If a document is transmitted elsewhere or destroyed, an archived record of it will remain for audit purposes, until off-loaded to an archived database.

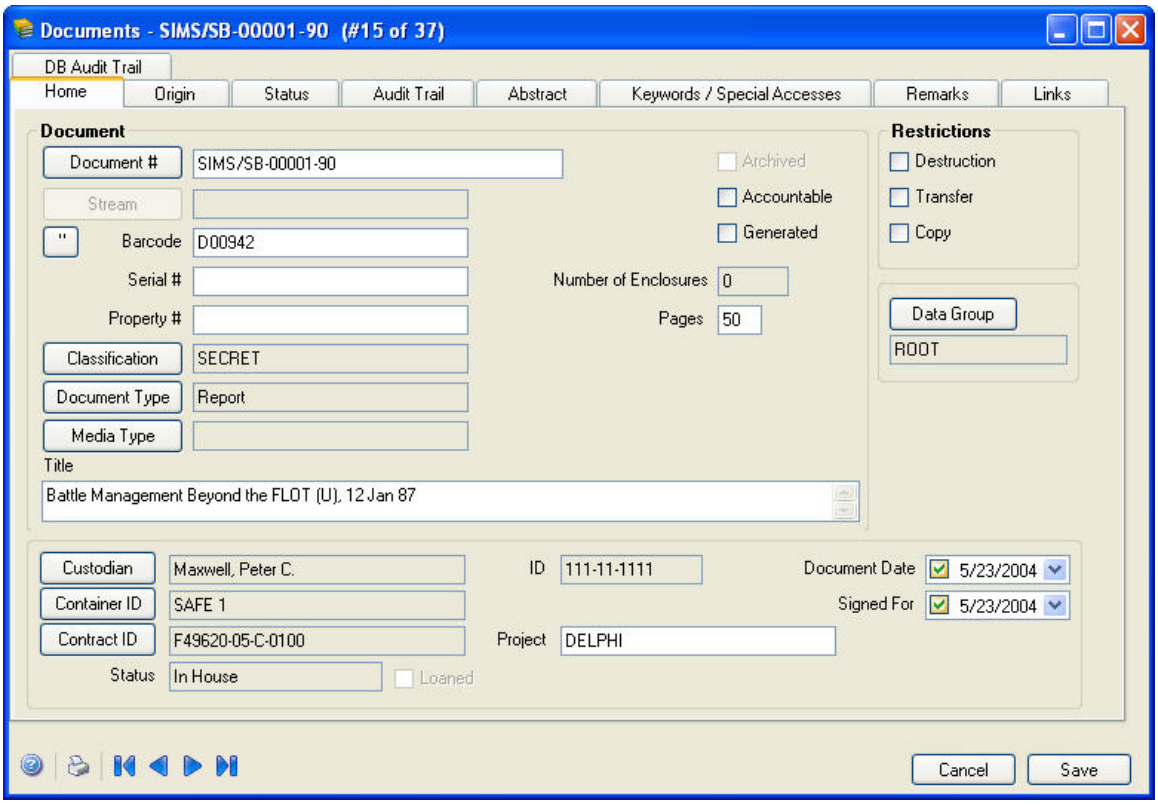
Input Screen Description
Home
Origin
Status
Audit Trail
Abstract
Keywords and Special Accesses
Remarks
Links

List Screen Description
Default Output List

Reports
Reports

Classified Documents Input

Classified Documents Home



For more information about using this screen, see Input Screen.

Classified Documents, Home Page Fields

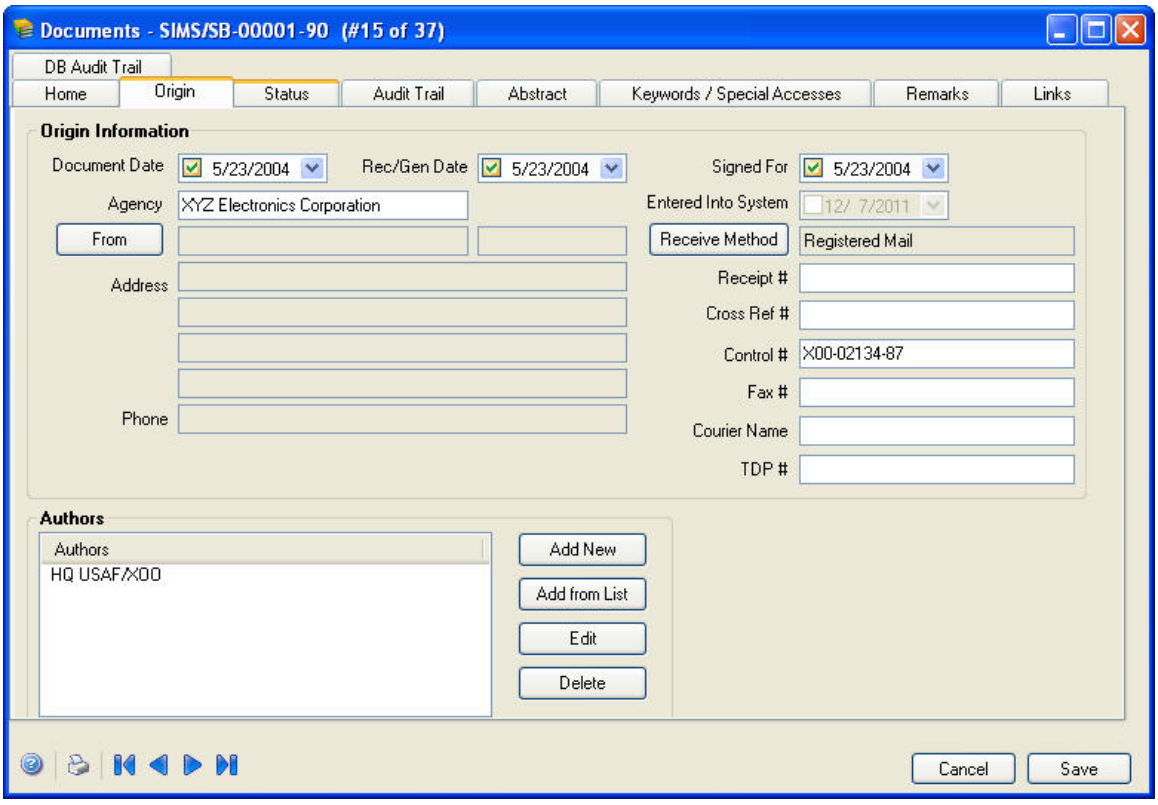
Field Name	Description
Document #	This field displays the currently defined document control number, either as defined by the selected Stream, Reserved Number, or as defined by clicking **D ocument #** and defining the document control number.
Archived	The **Archived** field indicates whether the document has been archived (i.e., either externally transferred or destroyed) or currently resides within the facility. The check box is always unchecked when a document is first entered into accountability and will be changed automatically upon external transfer or destruction of the document.
Accountable	Check here if this is an accountable document. Non-accountable documents will not appear on barcode inventory reports as missing, if they are not scanned.

Stream	Shows currently defined document numbering streams. Document numbering streams may be defined via the Document Numbering Streams utility. See also the topic Document Reserved Numbers which appears in the Transactions section.
Restrictions	Destruction: Check this box to prevent this document from being destroyed. Transfers: Check this box to prevent this document from being transferred outside of the host facility. Copy: Check this box to prevent this document from being copied.
Data Group	The data group that the document belongs to. Data groups are defined in the User Management Data Groups dialog.
Number of Enclosures	The number of enclosures relating to the document record. In the Document Transaction: Copy dialog, specify the number of copies. For example, specify 4. Then choose the Format button. In the Copy Document Format screen, select the check box option for Enclosures. If the document record is a parent document, and the 4 copies being generated are enclosures, the prefix or suffix may be modified in a way to indicate this. The copy prefix for document 1998-001 could be ", Enclosure 1". Each copy would then have the name, "1998-001, Enclosure 1", "1998-001, Enclosure 2", etc. Once the copies of the document records are created, the Enclosure field will update. In this example, the Enclosures field for the original and copied document records would contain the number "4". The Enclosures field is a read only field. In order to modify the field, the original and copied documents will need to be recreated since the field itself cannot be directly edited. The Advanced Data Field Defaults utility also allows the Enclosures field to be defined by a SIMS Manager or Submanager.
" (Ditto)	Copies the contents of the **Document Number** field into the **Barcode** field.

Barcode	Enter the barcode manually, via the keyboard, or scan it in using a barcode reader. Normally, the barcode for a document begins with the letter D (unless modified via the System Customization Utilities) and is followed by an alphanumeric string of 29 digits or less. Note that a ditto mark icon appears next to the barcode label field. Clicking on this "ditto" icon will cause the contents of the barcode label field to automatically be the same as that of the **Document #** field.
Pages	Enter the total document page count in this field.
Generated	The document may be specified as having been generated, by checking the **Generated** check box.
Classification	The classification level selection.
Document Type	The type of document (e.g., proposal, technical report, magnetic tape, floppy diskette, removable hard disk, photographs, etc.). Each type should be entered consistently. For example, if there are several floppy diskettes to be entered, always spell or abbreviate the phrase "floppy" or "5-1/4 diskette" in the same way for all Classified Documents records. This will allow the Find command or the document report that sorts by type to function optimally, by locating an exact match.
Serial Number	The serial number on magnetic media.
Property Number	Government property number.
Media Type	The type of media.
Title	The document title. This field can store titles up to 32,000 characters in length.
Custodian Name and ID	The person currently responsible for the document and is a required field. Clicking the **Custodian** button and then select the desired person from the pick list.
Document Date	The document's date of creation or publication.
Container ID	Indicates where the classified material is to be stored.
Signed For	The date of the last internal document transfer to the current custodian. This field also appears in Origin Tab of the Classified Documents record.

Contract ID	Identifies the contract. If there are multiple contracts assigned to a document, we suggest selecting a single contract and specifying additional contracts in the Remarks tab.
Project	Enables you to track documents assigned to particular projects.
Status	Indicates whether the document is "In House," "Transferred," or "Destroyed." If transferred, this field will indicate either "In Transit" or "Received." If a document is later returned to accountability, these values are reset. Click **Status** to go to the page with additional status information.
Loaned	A check mark indicates the document is on loan.

Classified Documents Origin



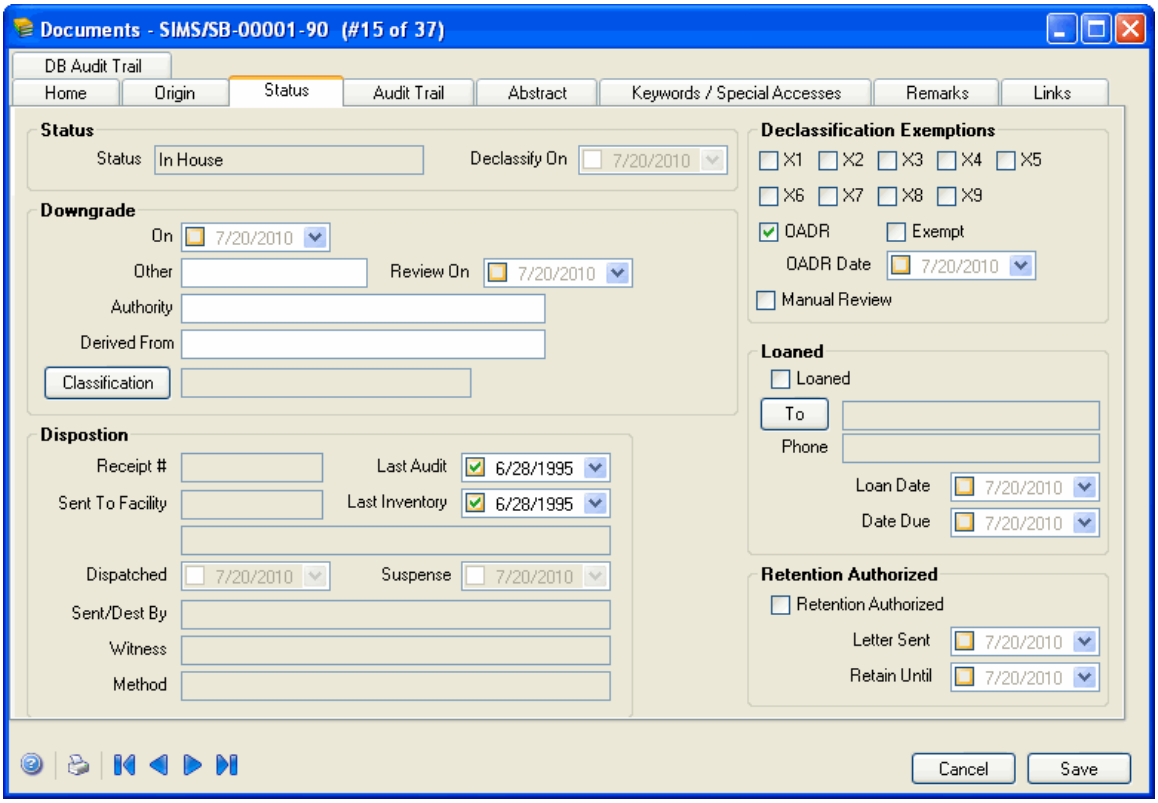
For more information about using this screen, see Input Screen.

Classified Documents, Origin Page Fields

Field Name	Description

Documentation Date	The document's date of creation or publication.
Rec/Gen Date	Indicates when the document was first brought into accountability.
Signed For	The date of the last internal document transfer to the current custodian. This field also appears in Home Tab of the Classified Documents record.
Agency	The name of the organization that originated the document.
Entered into System	This field is not editable. It will display the date that the document was first saved in SIMS.
From	The name of the organization from which you received the document. You can select this from the Facilities Pick List.
How Received	Select how the document was received (i.e. registered mail).
Receipt t#	The incoming receipt number (e.g., Registered Mail No.).
Control #	Indicates any sponsor's or issuing agency's control number that may have accompanied the document when it was received into accountability.
Cross-Ref #	Cross-reference number from originator.
Fax #	The fax number of the originator.
Courier Name	Name of courier.
TDP #	Form number from the generation of a classified request.
Authors	The document author(s).

Classified Documents Status



For more information about using this screen, see Input Screen.

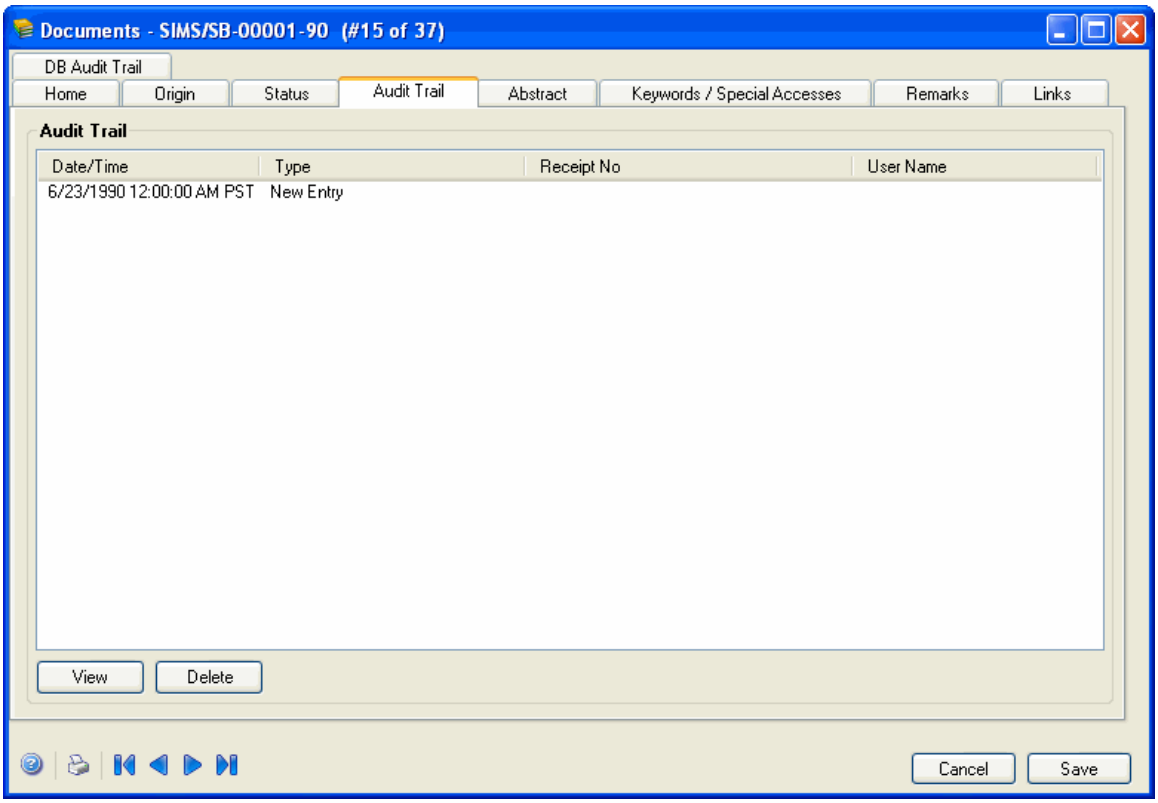
Classified Documents, Status Page Fields

Field Name	Description
Status	This field will always show a document as being "In House", "Transferred", or "Destroyed". If transferred, this field will indicate either "In Transit" or "Received". If a document is later returned to accountability, these values are reset.
Declassify On	The date the document requires declassification.
Downgrade Info	Documents may be downgraded as OADR or downgraded to a specified classification level on a specified date. Also, other types of downgrading may be specified via the **Other** field.
Declass Exemptions	Check any exemptions that are applicable.

Retention Authorized, Letter Sent, Retain Until	If retention of this document is authorized beyond the expiration of the contract to which it was originally assigned, check this box and enter the date when a letter was sent requesting retention and the date when retention authorization expiration expires. Note that these fields are automatically filled in upon performing a "Retain Until" transaction.
Loan Info	If a document is loaned through a transaction, then the transaction information will show up in these fields. Alternatively, a user can directly record a loan in this area.
Disposition Information	The disposition contains information from the most recent transaction performed on the document. The Audit Trail contains the entire history of transactions.
Last Audit	The date of the most recent document audit performed.
Last Inventoried	The date of the most recent physical inventory.
Sent to Facility	If a document was externally transferred, the name and ID of the receiving facility is recorded here.
Dispatched	When you destroy or externally transfer documents, this field is automatically updated to reflect the transaction date.
Suspense	The date by which the document external transfer receipt is expected to be signed and returned. This field is filled in automatically when you perform an external document transfer.
Receipt #	When you destroy or externally transfer documents, this field will automatically be updated to reflect the certificate of destruction number or external transfer receipt number.
Sent/Destroyed By	This field contains the name of the person that either externally transferred or destroyed the document. This field is filled in automatically when you perform an external document transfer or destruction.
Witness	This field contains the name of the person that witnessed the destruction of the document. This field is filled in automatically when you perform a document destruction.

Method	This field contains the method used to destroy the document. This field is filled in automatically when you perform a document destruction.

Classified Documents Audit Trail

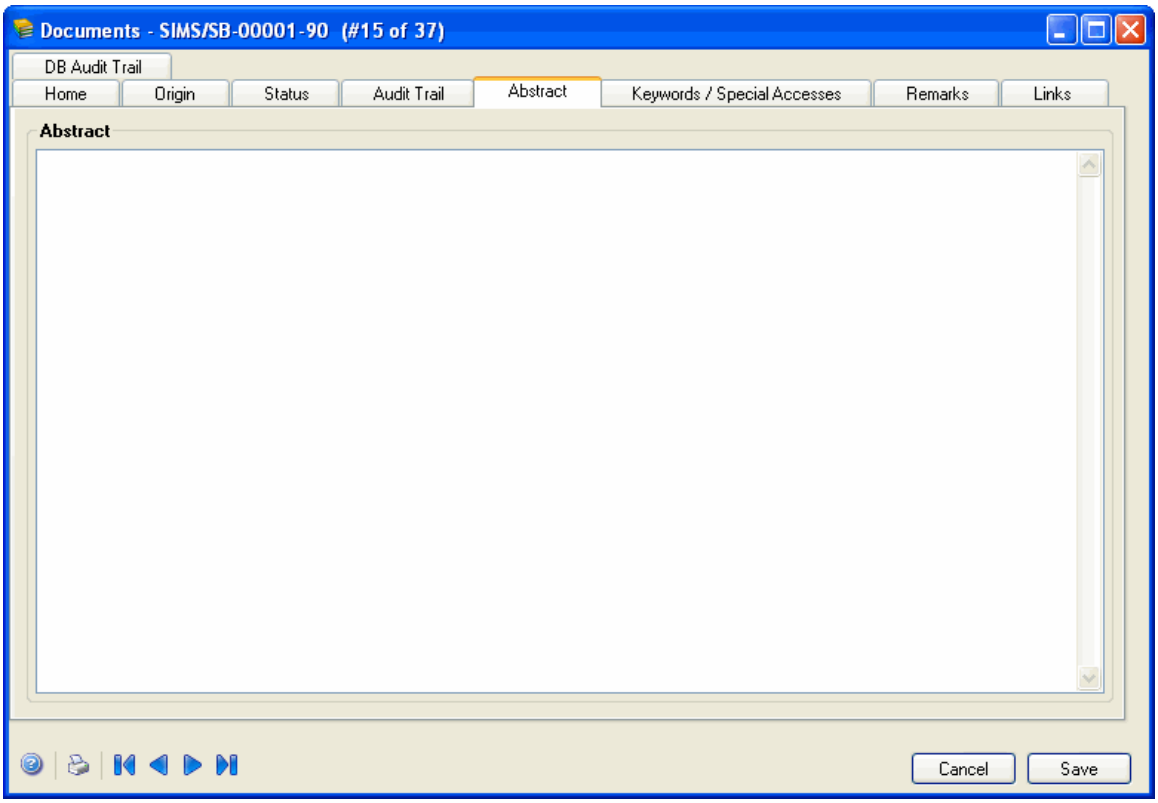


For more information about using this screen, see Input Screen.

Classified Documents, Audit Trail Page Fields

Field Name	Description
Audit Trail	The transaction history area displays the audit trail of internal/ external document transfers, returns to accountability, and document destruction. All data is automatically recorded in this area when a document is transferred or destroyed. It shows the date of transfer, receipt # (if any), previous custodian and new custodian. For an external transfer or return, the other facility's Facility ID is shown. To obtain additional information regarding a particular transaction, select the transaction of interest and then click **View**. Only SIMS managers can delete audit trail items. This option is grayed out for all other users.

Classified Documents Abstract

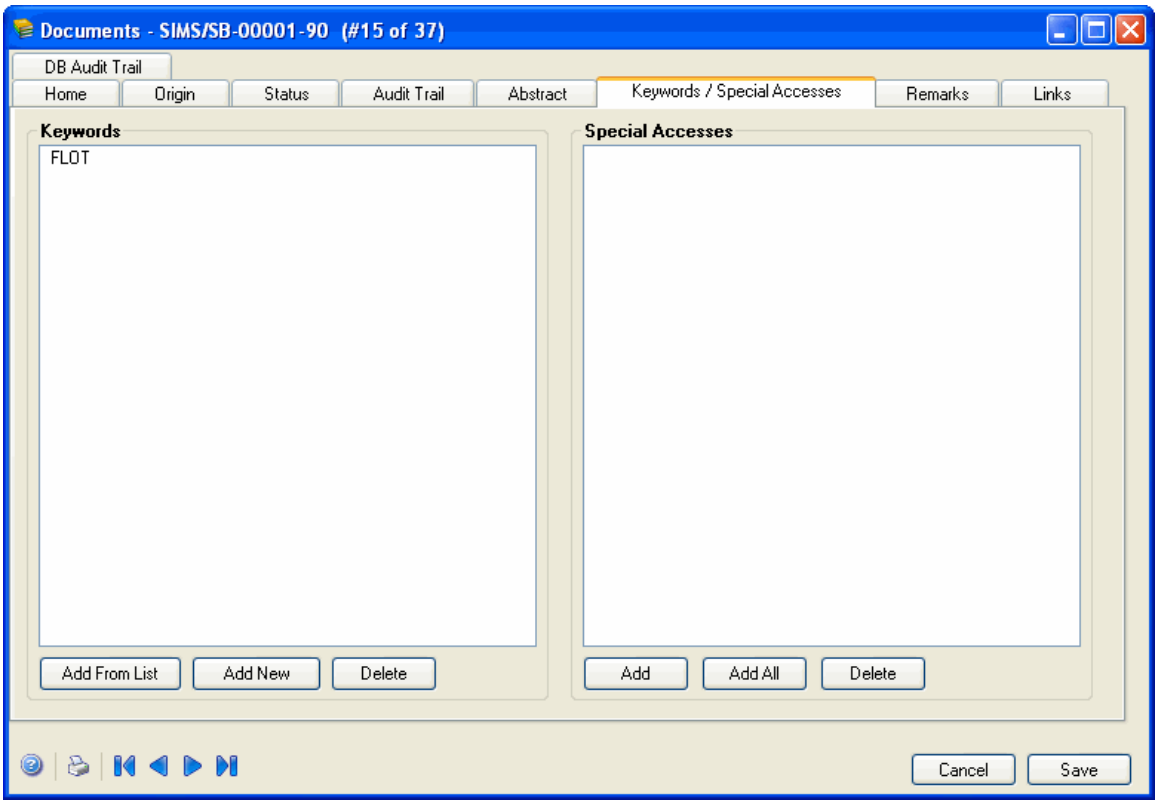


For more information about using this screen, see Input Screen.

Classified Documents, Abstract Page Fields

Field Name	Description
Abstract	Enter a short title or brief abstract of the document.

Classified Documents Keywords and Special Access

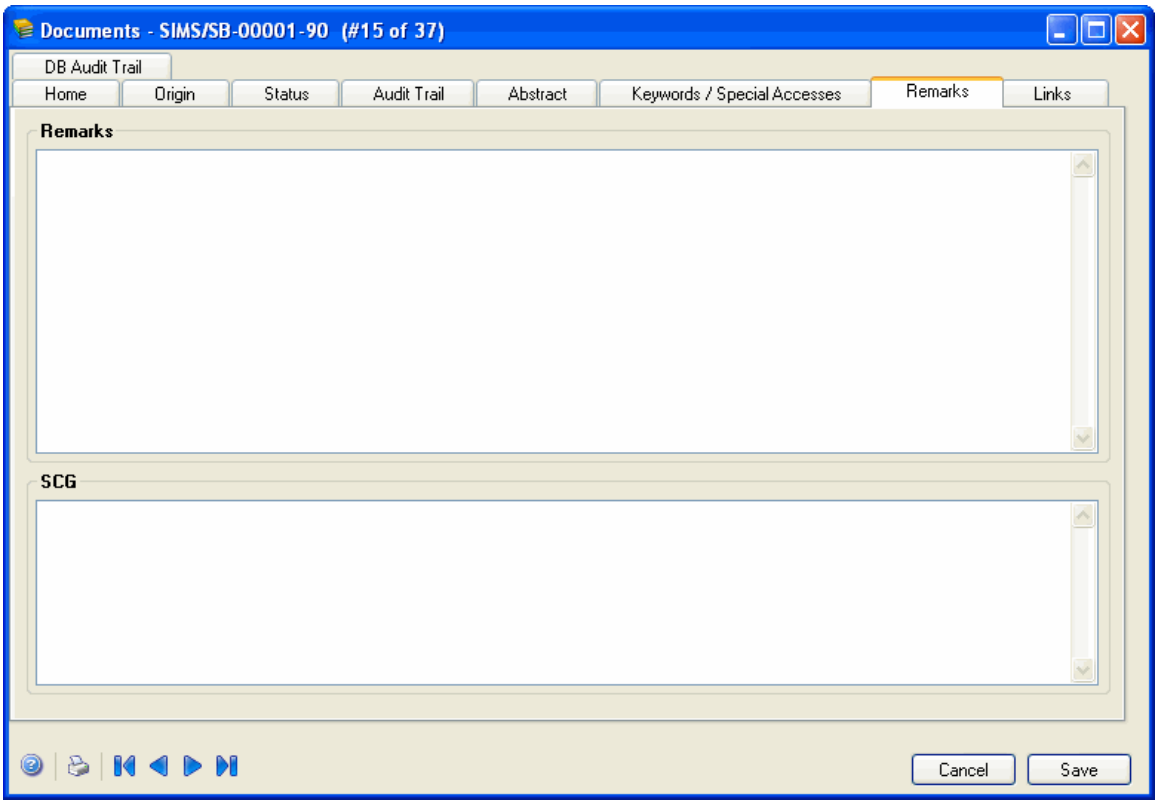


For more information about using this screen, see Input Screen.

Classified Documents, Keywords, Special Accesses Page Fields

Field Name	Description
Keywords	Contains keywords to support searching for this document.
Special Accesses	Lists any special access that this document requires, such as WNINTEL or COMSEC. If you add an access, it will be checked against the current custodian, container, and contract.

Classified Documents Remarks

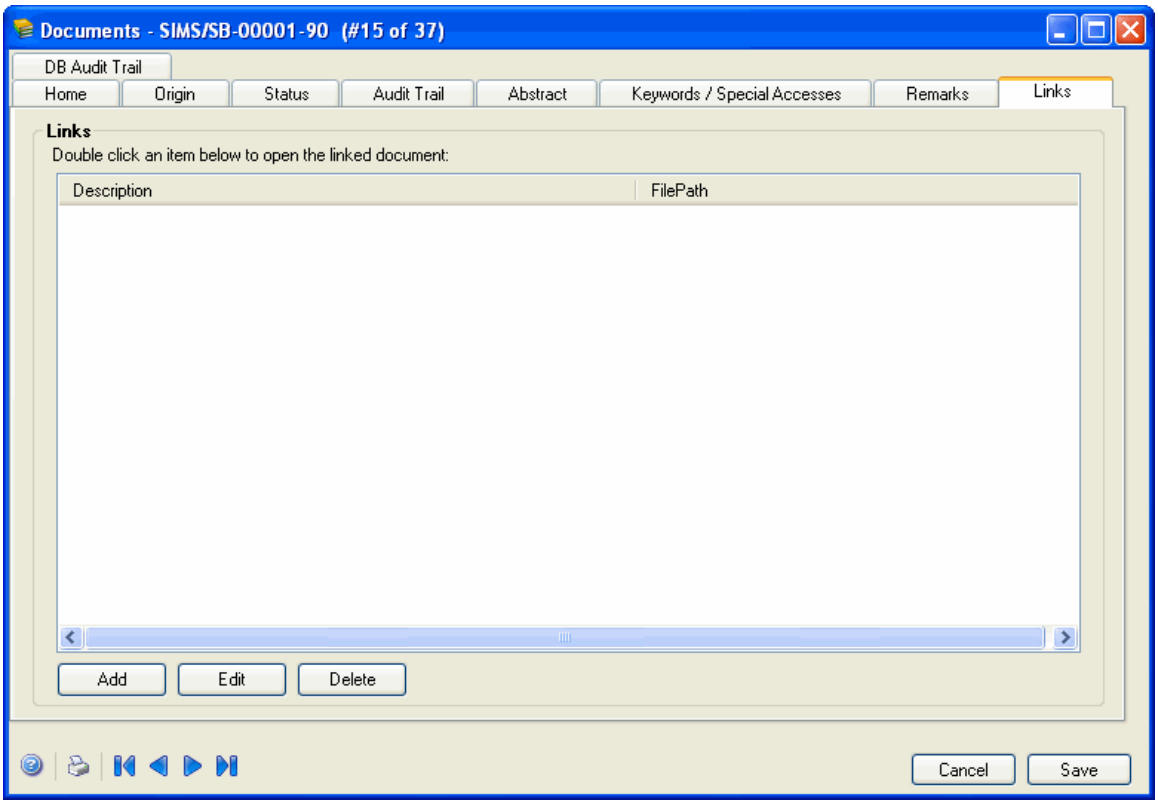


For more information about using this screen, see Input Screen.

Classified Documents, Remarks Page Fields

Field Name	Description
Remarks	Enter any remarks or other information regarding the document. The **Remarks** field is automatically updated whenever a document is copied, to reflect the parent for all copies made, and to indicate how many copies were made from the parent document.
SCG	The Security Classification Guide for the document. Free form information can be entered here.

Classified Documents Links



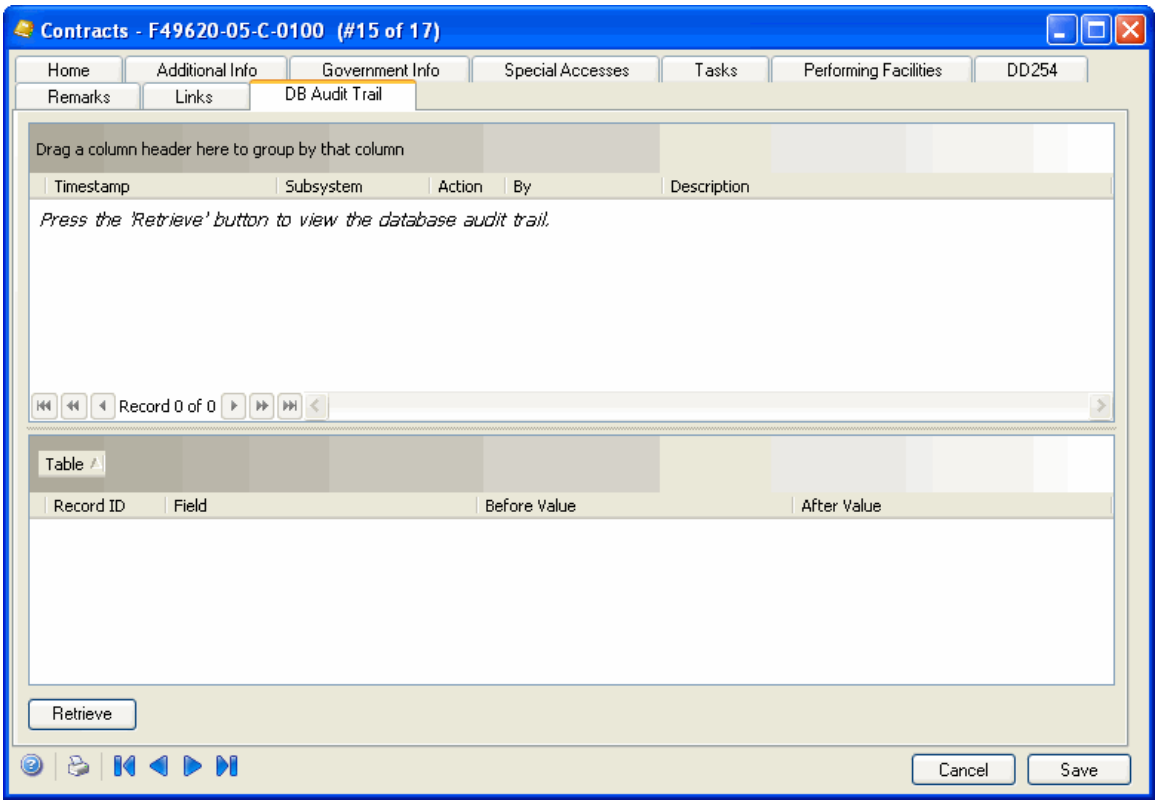
For more information about using this screen, see Input Screen.

Classified Documents, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Classified Documents DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Classified Documents, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

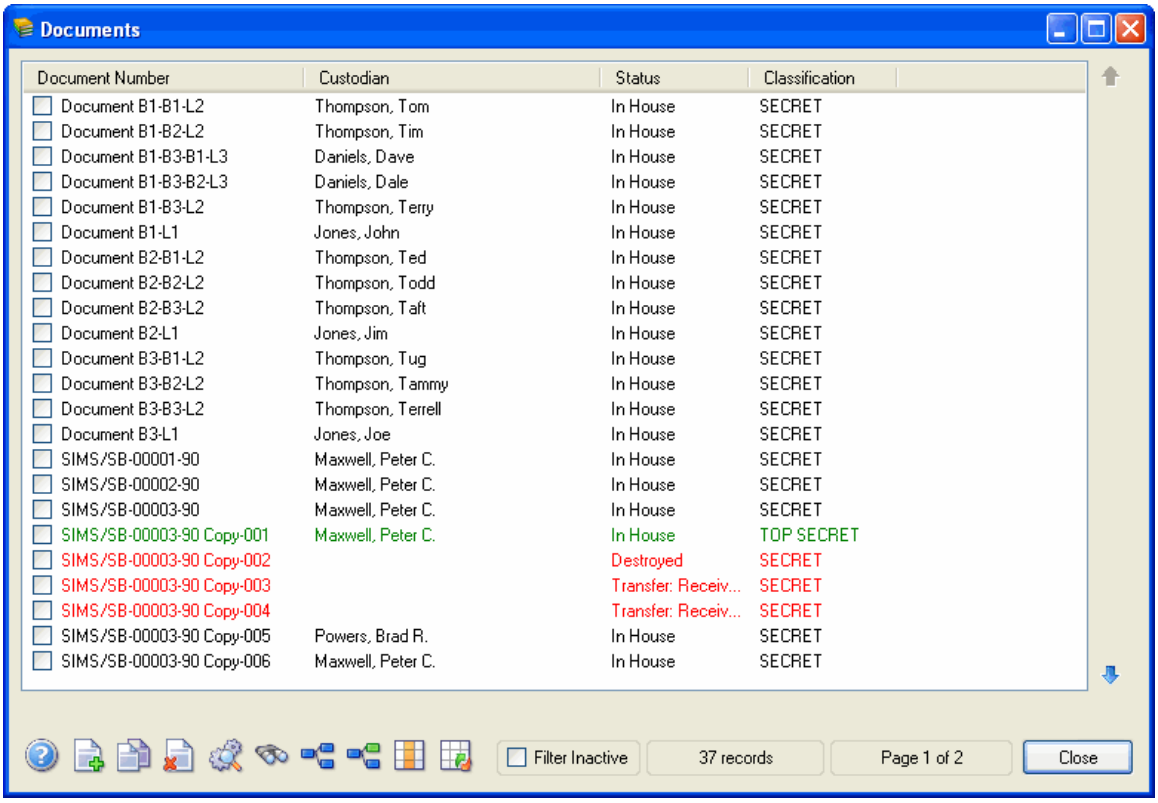
Classified Document List

Default Output List Screen

The Classified Document default output list screen shows the Document Number, Disposition, and Classification fields for each document record in the database.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields.


Documents
Document Number
Custodian
Status
Classification
Document B1-B1-L2 Thompson, Tom In House SECRET
Document B1-B2-L2 Thompson, Tim In House SECRET
Document B1-B3-B1-L3 Daniels, Dave In House SECRET
Document B1-B3-B2-L3 Daniels, Dale In House SECRET
Document B1-B3-L2 Thompson, Terry In House SECRET
Document B1-L1 Jones, John In House SECRET
Document B2-B1-L2 Thompson, Ted In House SECRET
Document B2-B2-L2 Thompson, Todd In House SECRET
Document B2-B3-L2 Thompson, Taft In House SECRET
Document B2-L1 Jones, Jim In House SECRET
Document B3-B1-L2 Thompson, Tug In House SECRET
Document B3-B2-L2 Thompson, Tammy In House SECRET
Document B3-B3-L2 Thompson, Terrell In House SECRET
Document B3-L1 Jones, Joe In House SECRET
SIMS/SB-00001-90 Maxwell, Peter C. In House SECRET
SIMS/SB-00002-90 Maxwell, Peter C. In House SECRET
SIMS/SB-00003-90 Maxwell, Peter C. In House SECRET
SIMS/SB-00003-90 Copy-001 Maxwell, Peter C. In House TOP SECRET
SIMS/SB-00003-90 Copy-002 Destroyed SECRET
SIMS/SB-00003-90 Copy-003 Transfer: Receiv... SECRET
SIMS/SB-00003-90 Copy-004 Transfer: Receiv... SECRET
SIMS/SB-00003-90 Copy-005 Powers, Brad R. In House SECRET
SIMS/SB-00003-90 Copy-006 Maxwell, Peter C. In House SECRET
Filter Inactive
37 records
Page 1 of 2
Close

Filter Inactive
Check the **Filter Inactive** check box to prevent archived documents from appearing on this output screen.
For more information about using this screen, see:

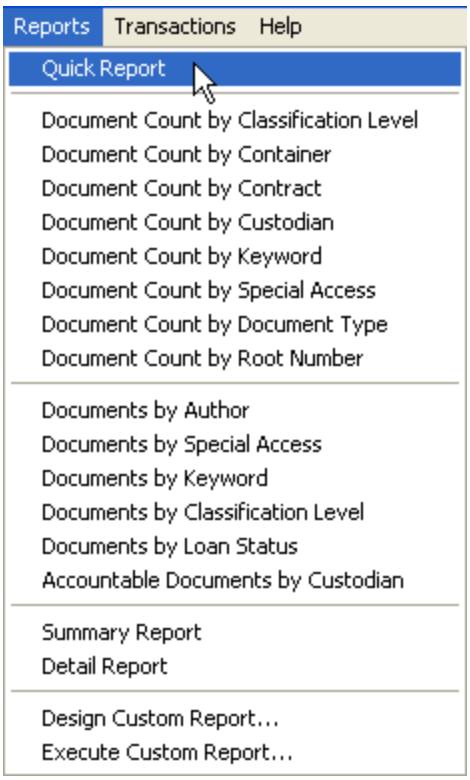
- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Classified Documents Reports

Classified Documents Reports

Reports Menu
For more information about the default reports that appear in every module, see:

- Standard Reports



Classified Documents Reports Menu

Document Count by Classification Level
This report provides a count of Documents that are associated with each Classification Level.
Document Count by Container
This report provides a count of Documents that are associated with each Container.
Document Count by Contract
This report provides a count of Documents that are associated with each Contract.
Document Count by Custodian
This report provides a count of Documents that are associated with each Custodian.
Document Count by Keyword
This report provides a count of Documents that are associated with each Keyword.
Document Count by Special Access
This report provides a count of Documents that are associated with each Special Access.
Document Count by Document Type
This report provides a count of Documents that are associated with each Document Type.
Document Count by Root Number
This report provides a count of Documents that have that same Root Number.
Documents by Author
This report provides a list of Documents that are associated with each Author.
Documents by Special Access
This report provides a list of Documents that are associated with each Special Access.
Documents by Keyword
This report provides a list of Documents that are associated with each Keyword.
Documents by Classification Level
This report provides a list of Documents that are associated with each Classification Level.
Documents by Loan Status

This report provides a list of Documents that are associated with each Loan Status.

Accountable Documents by Custodian

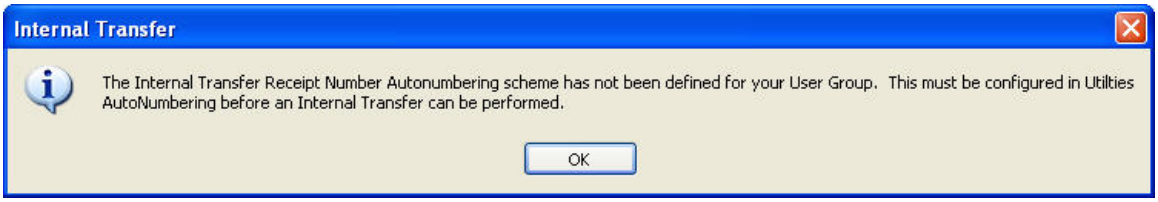
This report provides a list of accountable Documents along with an accountable document and custodian count.

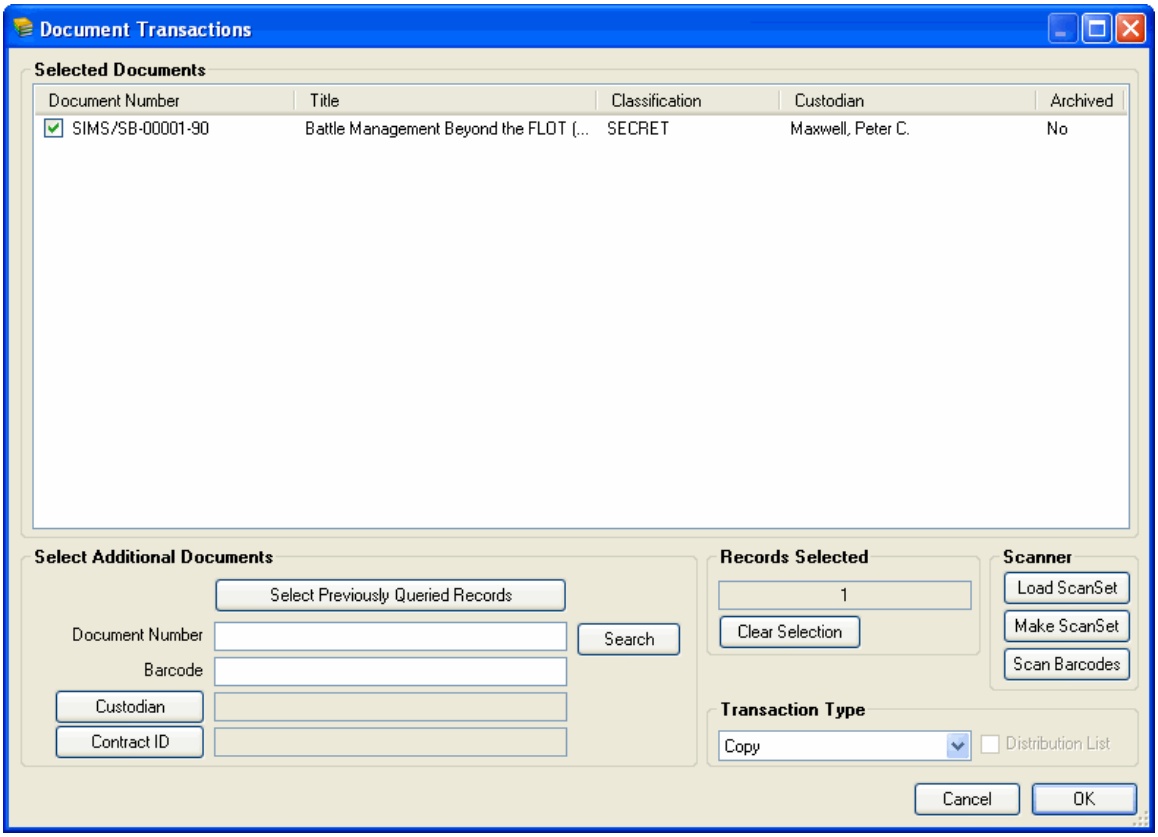
Transactions

Classified Documents Transactions

While in the Classified Document module, highlight or query on the records on which to perform the transaction. Select the Transactions menu and then a transaction option (i.e. Internal Transfer). Default values can be set for the Document transaction screens by going to Utilities -> Transaction Defaults.

In order to perform an Internal or External transfer, auto-numbering must be defined for the User Group under which you are logged in. If either Internal or External Transfer is selected, and auto-numbering is not defined for your User Group, the following error message will display when selecting the OK button in the Document Transactions dialog. Go to Utilities -> Autonumbering to create an autonumbering scheme and to verify that the autonumbering is enabled.


Internal Transfer
The Internal Transfer Receipt Number Autonumbering scheme has not been defined for your User Group. This must be configured in Utilties AutoNumbering before an Internal Transfer can be performed.
OK



Document Transaction Screen and Menu

The upper half of the transaction screen displays a list of documents. A check mark in the left column indicates a

selected document in which to perform the transaction.

Select Previously Queried Records
In the Document output screen, query for selected records, and leave the records unhighlighted. Select the Transactions menu and then a transaction option (i.e. Internal Transfer). Choose the "Select Previously Queried Records" button to add all the records that were queried on in the output screen. A confirmation message to add those records will appear. The records are added to the list. The transaction will be performed only on checked documents when selecting the OK button. Any document listed in the Document Transactions screen (as shown above) can be unchecked and the transaction for that record will not be performed.

Search
Quickly select groups of documents by entering a Document Number, Barcode, Custodian Name, or Contract, and then the Search button.

If a more complex query is required, use the Quick Find Editor *before* selecting **Transactions** in the Document output list screen. Any documents selected in the output screen will be selected when the Transactions screen is displayed. Barcodes can be manually entered or scanned in while using this dialog. This is recommended when there are only a few barcode numbers to scan. If there is a need to quickly search and scan for a bulk group of barcodes, choose the Scan Barcodes button instead.

Sort
Click a column header to sort the list of documents by Document Number, Title, Classification, Custodian, or the Archived field.

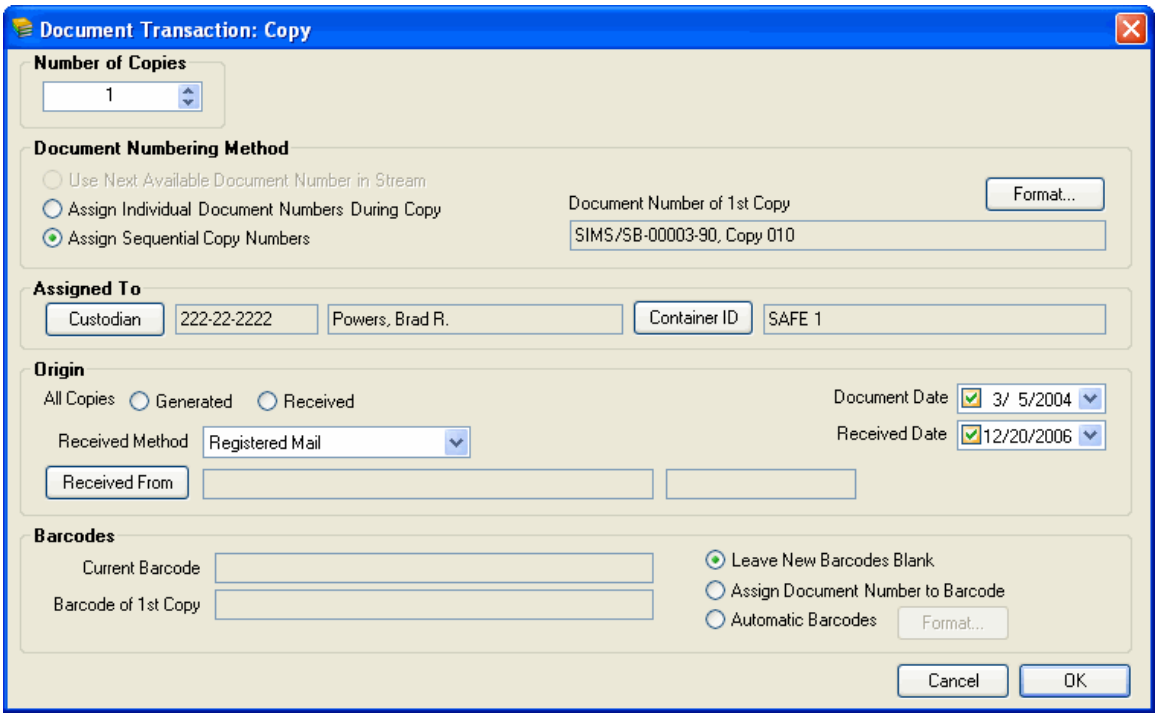
Records Selected
This display shows the number of documents that have been selected for a transaction. These documents will also have a check mark beside each document's number.

OK
Click to actually perform the transaction on the selected documents.

Transactions
Copy Document
Internal Transfer to a Single Custodian
Internal Transfer to Multiple Custodians
Internal Transfer Receipt Return
External Transfer to a Single Facility
External Transfer to Multiple Facilities
External Transfer Receipt Return
Tracer Letter
Return to Accountability
Destruction Certificate
Contract Transfer
Retention
Regrade Classification
Incorporation
Loan Check Out
Loan Check In
Barcode Inventory
Manual Inventory
Transaction Reprints
Reserve Document Numbers
Scan Barcodes

Load ScanSet / Make ScanSet
Random Audit

Classified Document Copy



Document Numbering Method

Field Name	Description
Number of copies	Specify that number of copies that you want.
Use Next Available Number in Stream	Document copies will get new document numbers based on the sequencing defined in the Document Numbering Streams in Utilities. The actual Stream record used is determined by the original document's Stream ID. Choose this method if you want all copies to have their own unique document numbers.
Assign Individual Document Numbers During Copy	Choose this option if you want to assign individual document numbers for each copy.
Assign Sequential Copy Numbers	Each new document copy will have the original's "root number" with a copy number automatically appended to it. The copy numbers are determined by the sequencing defined in the Document Numbering Streams in Utilities. The actual Stream record used is determined by the original document's Stream ID.

Document Number of 1st Copy	This shows you what the document number the first copy will get based on the type of copy you have selected above. This is simply a display for you to verify the type of document number you will generate.

Field assignment options for copies

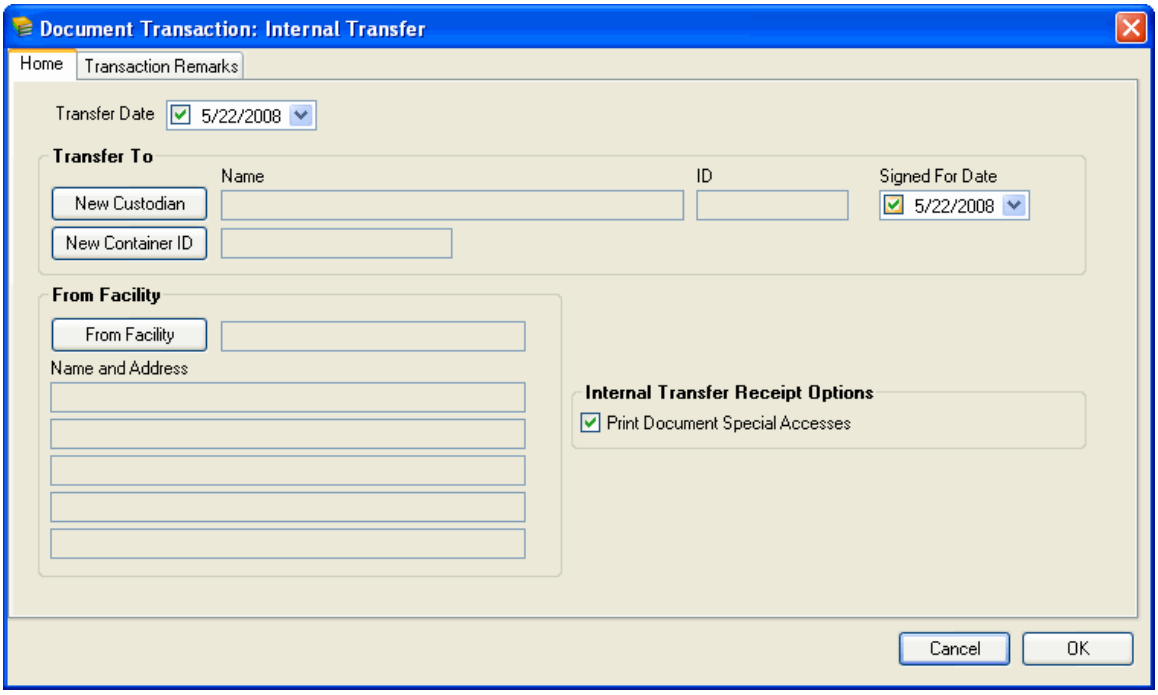
Field Name	Description
Custodian and Container	You can select the Custodian and/or Container to be assigned to all of the copies you are about to generate. If you leave these blank, the Custodian and Container from the original document will be assigned.
All Copies... Generated or Received	If you are generating the copies in-house, select **Generated**. If you received a group of copies and you want to use the copy function to enter the additional copies, select **Received**.
Document Date, Received Date	You can modify the Document Date and/or Receive Date. If left blank, the dates from the original will be used.
Received Method, From	You can modify the Document Received Method and/or Receive From information. If left blank the data from the original will be used.

Barcodes

Field Name	Description
Current Barcode	Displays the barcode of the original document.
Leave New Barcodes Blank	All copies will have blank barcode fields.
Assign Doc Number to Barcode	The document number will be put in the barcode field. Use this option if you use the document number for your barcode.
Automatic Barcodes	You can modify the barcode format. The format will automatically be used for each new document record.

Internal Transfer to a Single Custodian

The document internal transfer transaction to a single custodian screen is shown below.



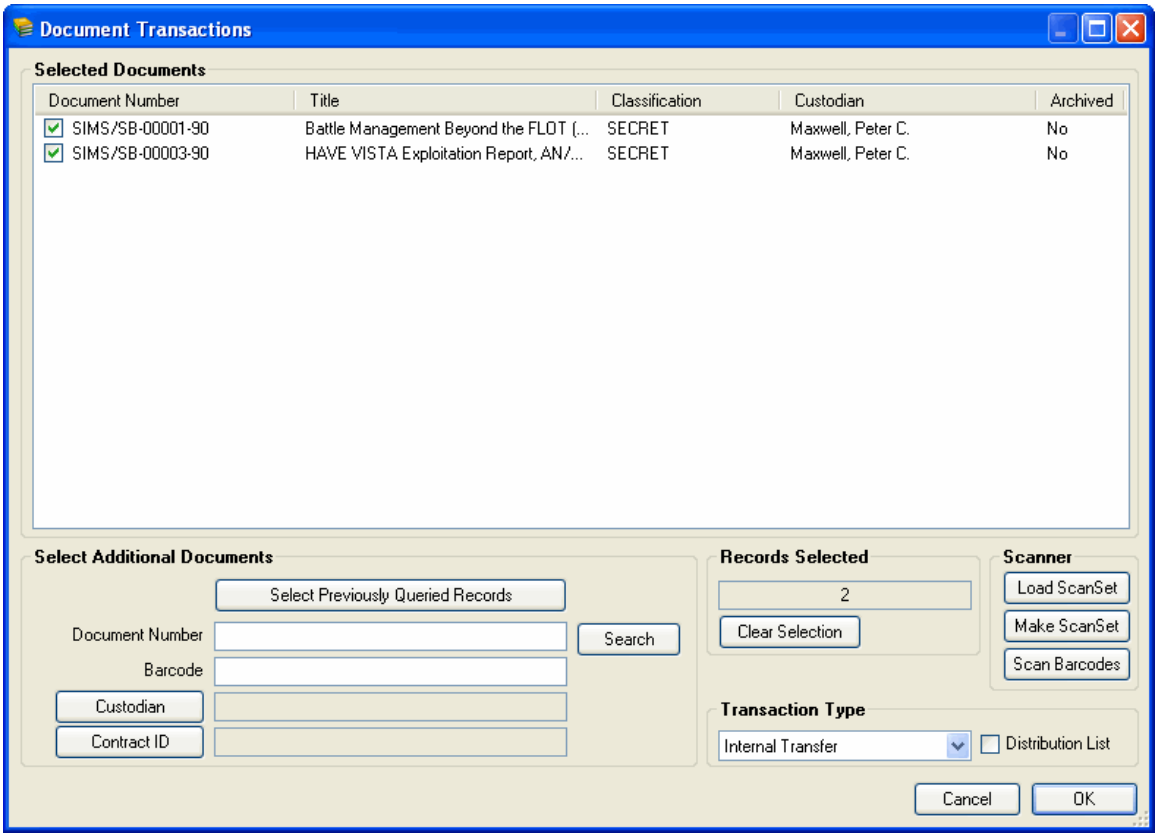
Internal Transfer
Transfer Date
Enter the date of the transfer.
New Custodian
Click **New Custodian** to select a new custodian. All documents selected for transfer are checked against the new custodian in conjunction with error check settings.
New Container ID
Select the new container for the internal transfer.
Signed for Date
Enter a signed for date for the internal transfer.
From Facility
Select a From Facility for the internal transfer. The From Facility must have a Facility ID
Print Document Special Accesses
If selected, the document's special accesses will appear on the internal transfer certificate.
Remarks
Enter any remarks to appear on the transfer certificate.
Click **OK** when all of the requirements have been fulfilled. The documents must pass a validation process for the transfer.
After the documents pass validations, the internal transfer report will print.

Internal Transfer to Multiple Custodians

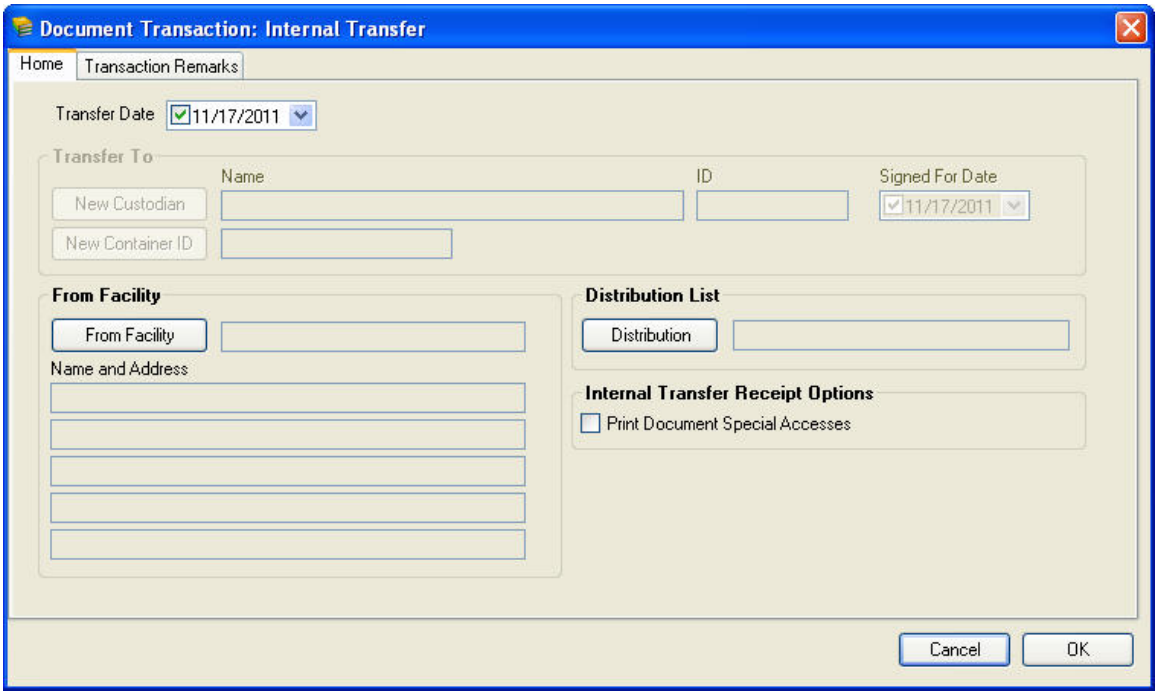
Suppose that a SIMS user has generated 70 copies of a document and now wants to send one copy to each of 70 personnel.
Using the previously described internal transfer technique, this would require 70 separate transactions. However, this can be easily done in a single transaction.
To execute an internal transfer to multiple custodians, all documents to be processed must have the same Root ID,

which means that they must be copies of the same document.
Click on Distribution

First, select the documents to be transferred, and then go to Transactions and select **Internal Transfer**. The **Distribution List** check box, just below the list of transaction types, will become active.

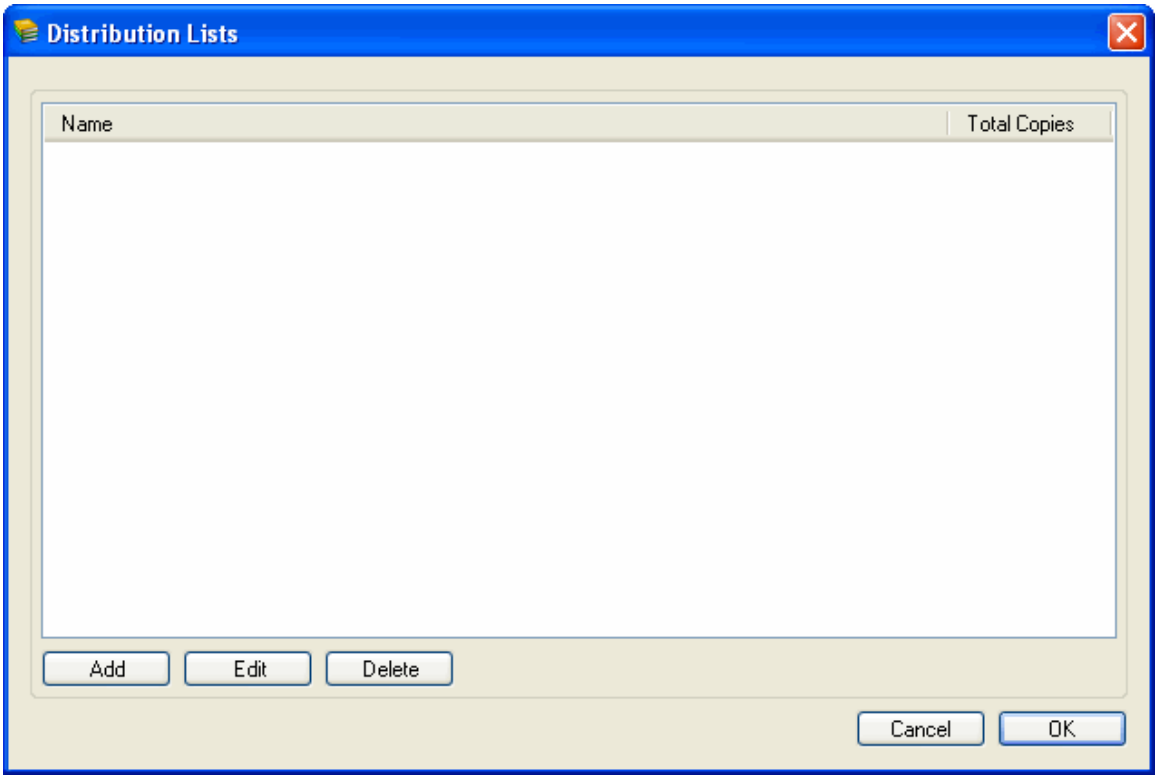


Click **OK**, and the Internal Transactions screen shown below will appear.



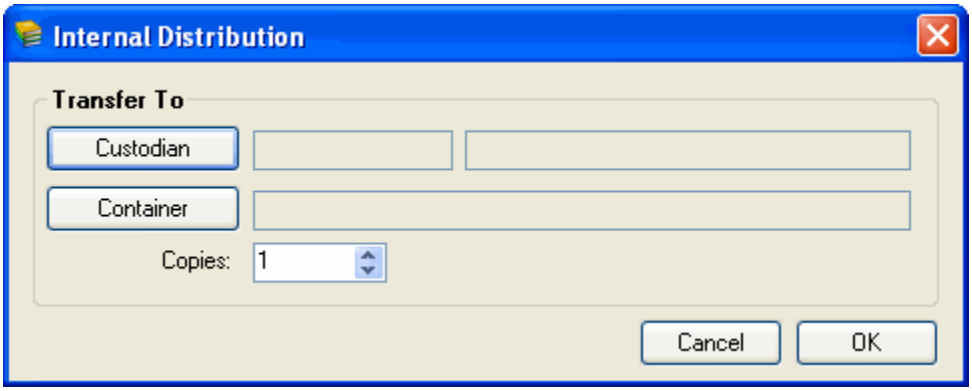
Click **Distribution** and the setup screen shown below will appear.

Internal Distribution
Distribution lists are the key to multiple recipient type transactions. The first time the screen shown above is displayed, there won't be any previously defined distribution lists shown on the dialog beneath the words **Internal Distribution**. To create one, click **Add**, which will bring up the distribution list entry menu shown below.



Internal Transfer Distribution List Screen

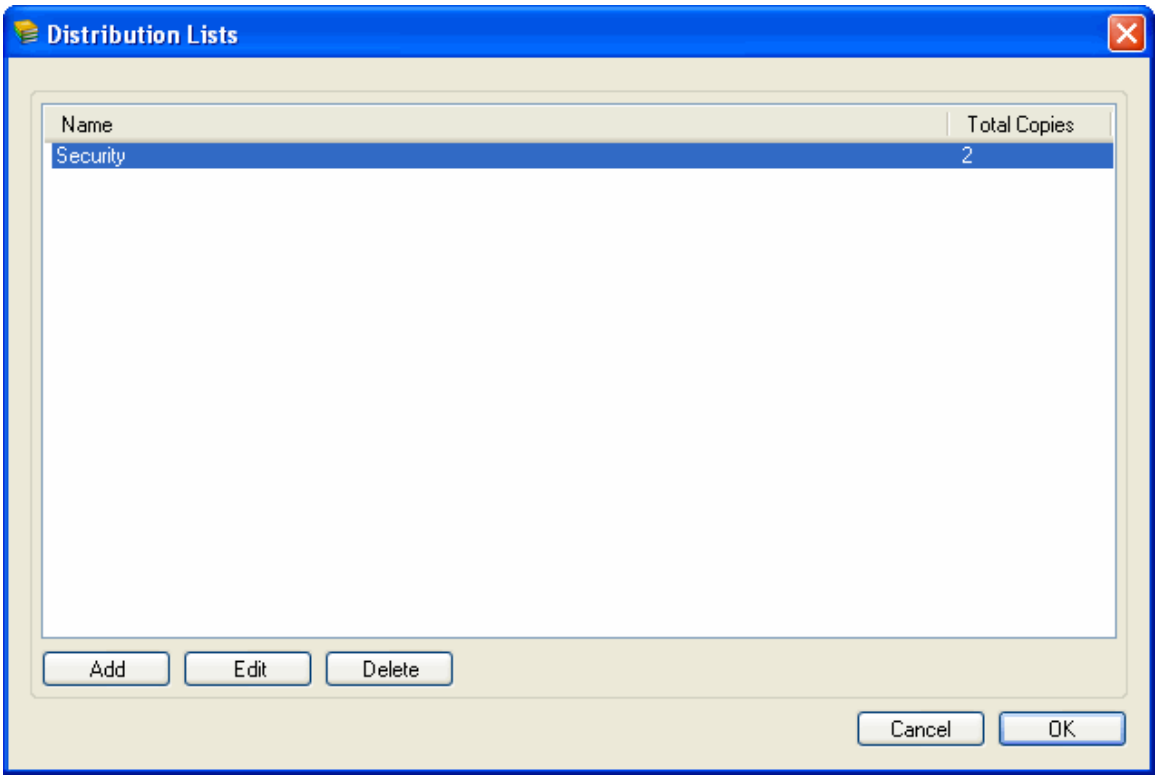
After you name the distribution list, add personnel by clicking **Add**, which brings up the screen shown below.



Internal Transfer Distribution List Entry Screen

A pick list can be brought up by clicking the **Custodian** or **Container** buttons. The number of copies are entered

here.
After the distribution list has been created, click **OK** to exit the Distribution List input screens. The Distribution screen shown below has changed to reflect the list that was just created.



Internal Transfer Distribution Example

After the distribution list has been set up, click **OK** (remember, the number of documents assigned to the recipients on the list must equal the number of selected documents).
The transaction can now be initiated by choosing OK in the Document Transaction: Internal Transfer dialog.

Internal Transfer Receipt Return

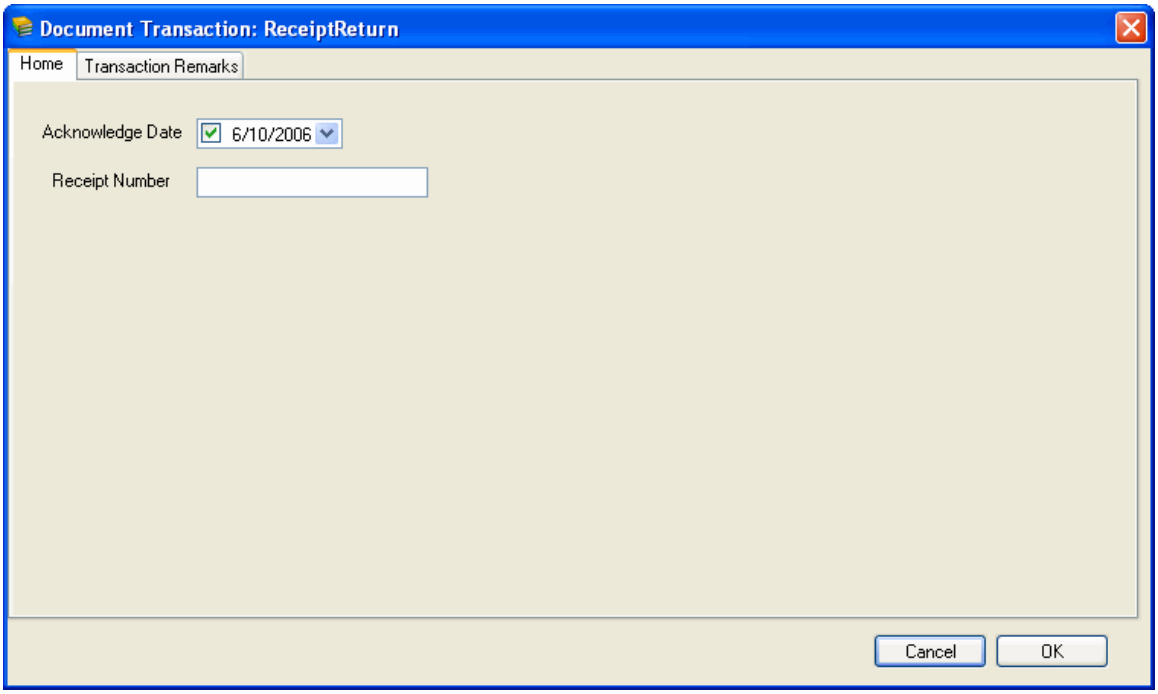
The document internal transfer receipt return transaction confirms the receipt by a new custodian of the documents included in a prior internal transfer.

If you enter a value other than zero into the Internal Transfer suspense time period, in the Time Periods tab of System Customization, then all internal document transfer transactions will fill in the document Receipt #, Suspense Date, and Dispatch Date. However, the Signed for Date will be left blank, until the Internal Transfer Receipt has been signed and returned.

Please, note however, that if you do not want to use the internal document transfer receipt returned feature, you do not need to. In other words, if the internal document transfer suspense time period in days is blank (as identified in the System Customization utility) then internal document transfers are assumed to not require the receipt return feature.

Conversely, if any number of days are specified for the internal document transfer suspense time period, then the internal transfer receipt returned feature is enabled and the "signed for" date will initially be set to a blank date, and later will be updated with the date that the receipt is returned.

After selecting this transaction, enter the Receipt Number found on the returned internal transfer receipt, as shown below.

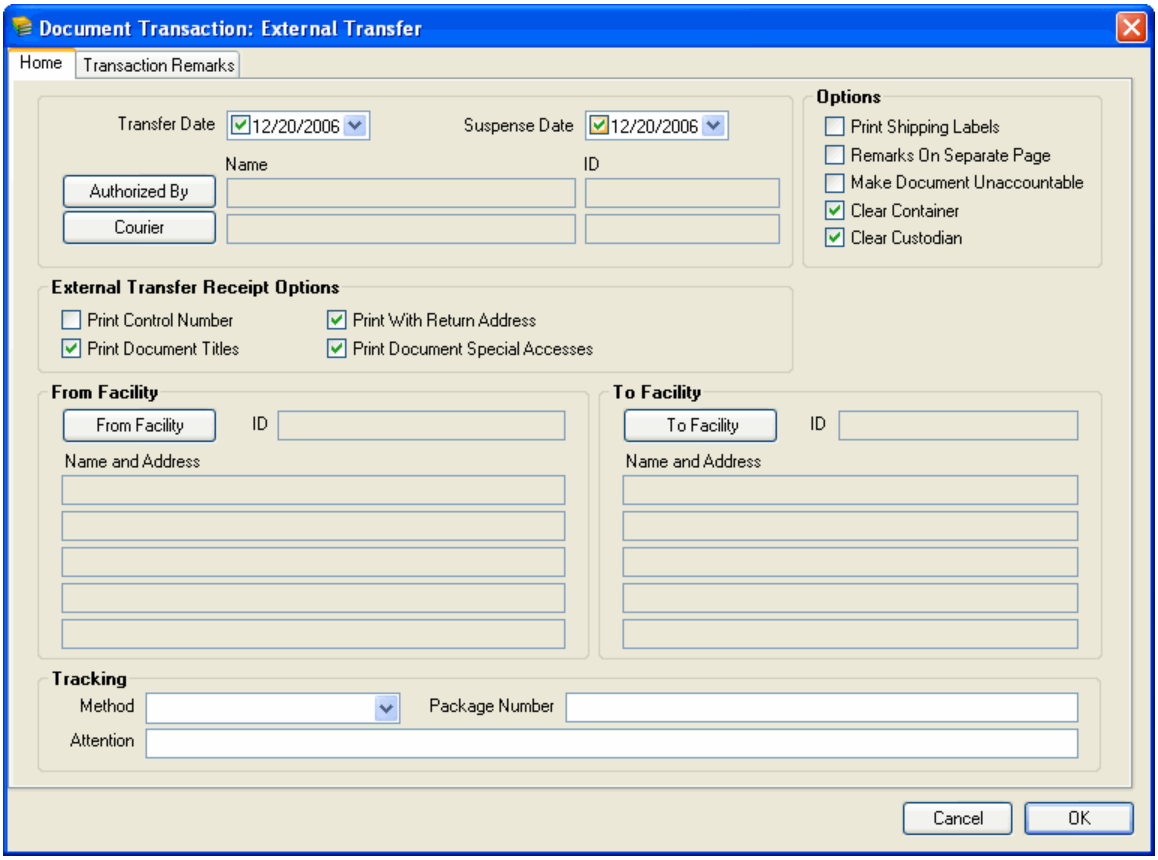


Internal Transfer Receipt Return

Acknowledge Date
Enter the date when the signed transfer receipt was returned.
Receipt Number
Enter the Receipt Number found on the returned internal transfer receipt.
Click **OK** when all of the requirements have been fulfilled.

External Transfer to a Single Facility

The document external transfer report prints a receipt for transferring one or more documents to a facility (or group if facilities, via a distribution list) currently in the Host Facilities or Other Facilities database. The document external transfer transaction screen is shown below.



External Transfer

Authorized by

Select a person who is responsible for the external transfer. Choose a visitor or personnel record that is authorized to transfer documents. On the upper right section on the 'Home' tab of the selected Personnel record, the Authorized To 'Transfer' check box must be checked in order for the personnel record to be selected in the 'Authorized by' field.

Courier

Select a person who will be the courier for the external transfer. Choose a visitor or a personnel record that is authorized as a courier. On the upper right section on the 'Home' tab of the selected Personnel record, the Authorized To 'Courier' check box must be checked in order for the personnel record to be selected in the 'Courier' field.

Print Control Number

If selected, the control number will appear on the external transfer certificate.

Print Document Titles

If selected, the document titles will appear on the external transfer certificate.

Print with Return Address

If selected, a return address will appear on the external transfer certificate.

Print Document Special Accesses

If selected, the document's special accesses will appear on the external transfer certificate.

Print Document Special Accesses

If selected, the special accesses for the document record(s) will appear on the external transfer certificate.

Print Shipping Labels

If checked, a label generation wizard will appear to document external transfer shipping labels. The wizard allows changes to be made to the type of pre-defined label format, size, and number of labels per page.

Remarks on separate page

If checked, remarks will print on a separate page at the end of the external transfer certificate.

Make Document Unaccountable

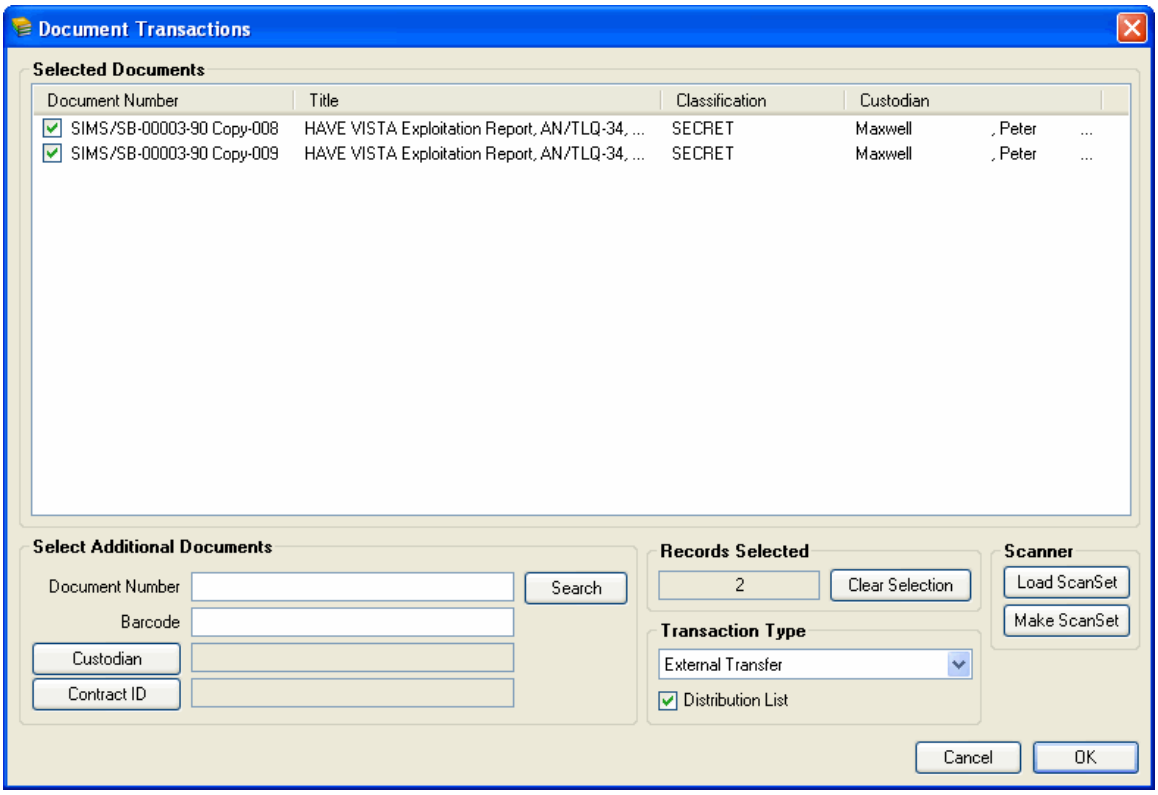
If checked, the document will be made unaccountable after the transaction.

Clear Container
If selected, the container for the document record(s) will be cleared once the external transfer transaction has completed.
Clear Custodian
If selected, the custodian for the document record(s) will be cleared once the external transfer transaction has completed.
From Facility and To Facility
Choose the From Facility button to select a From Facility from a pick list.
Choose the To Facility button to select a To facility from a pick list. The facility must have a Facility ID and at least one address.
Tracking Method
Enter the method to be used for document transfer (e.g., Registered Mail, Hand-Carry, etc.).
Package Number
Enter a package number.
Attention
Enter a name of a person. This attention name will appear on the external transfer certificate.
Remarks
Enter any remarks to appear on the transfer certificate.
Click **OK** when all of the requirements have been fulfilled. The documents must pass a validation process for transfer.
After the documents pass validations, the external transfer certificate will print out.

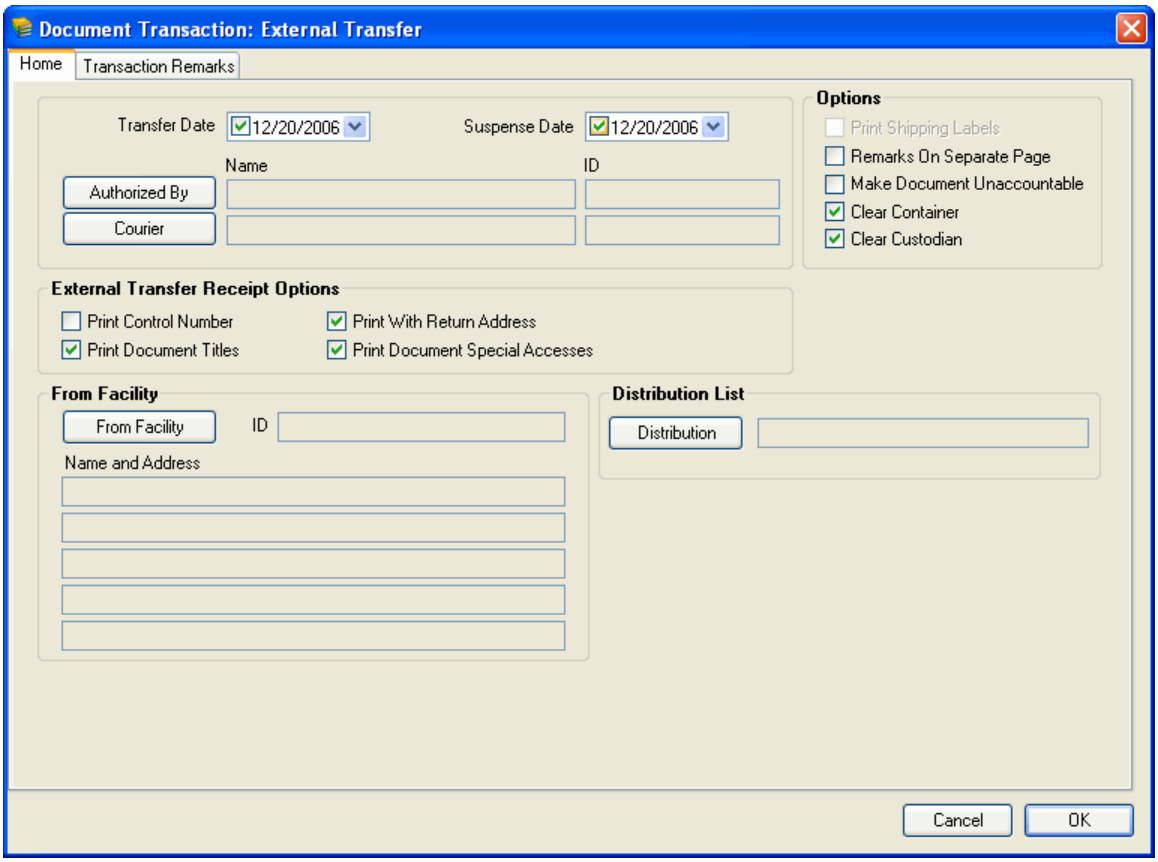
> ☑ If an external transfer is executed by a mistake or if a user wishes to undo a transfer, you can use the 'Return to Accountability' transaction. In the transaction remarks, the user can add a comment saying that the document never left the facility and that the transaction was made in error.

External Transfer to Multiple Facilities

Suppose that a SIMS user has generated 70 copies of a document and now wants to send one copy to each of 70 facilities. Using the previously described external transfer technique, this would require 70 separate transactions. However, this can be easily done in a single transaction.
To execute an external transfer to multiple facilities, all documents to be processed must have the same Root ID, which means that they must be copies of the same document.
First, select the documents to be transferred and then go to **Transactions** and select **External Transfer**. The **Distri bution** check box , just below the list of document transaction types, will become active.

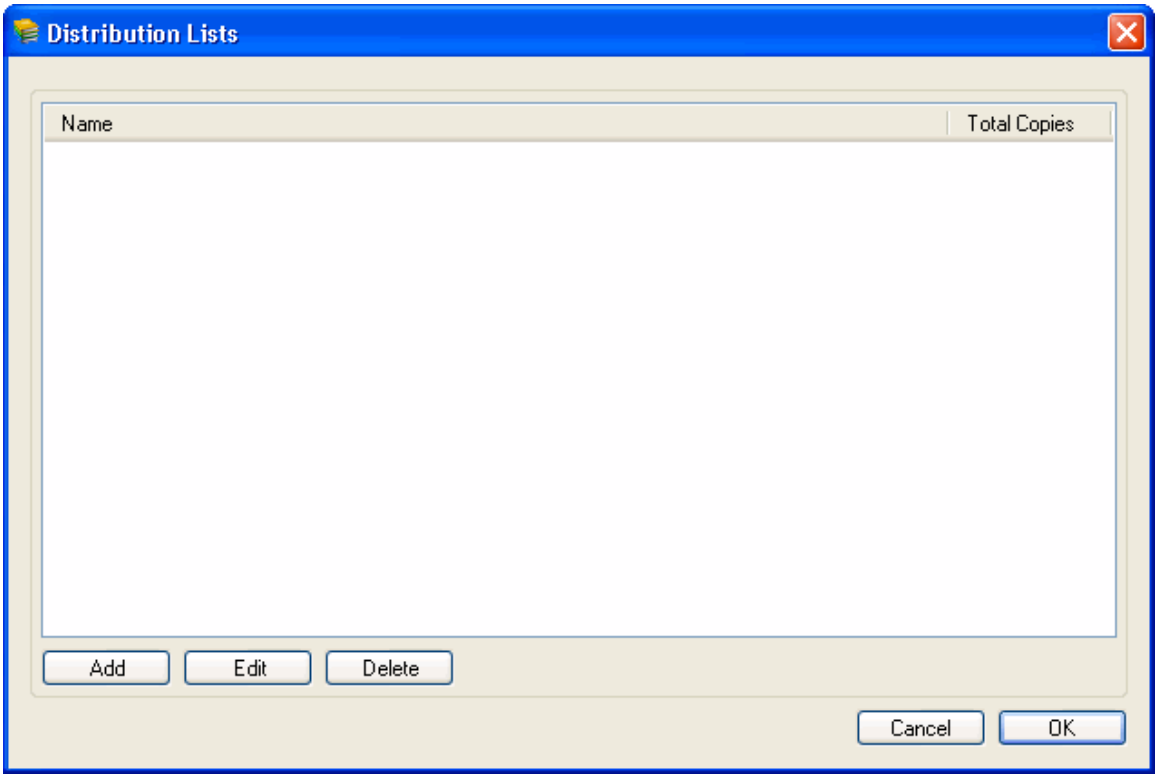


Check the option **Distribution List**, and then choose OK. The following setup screen appears.



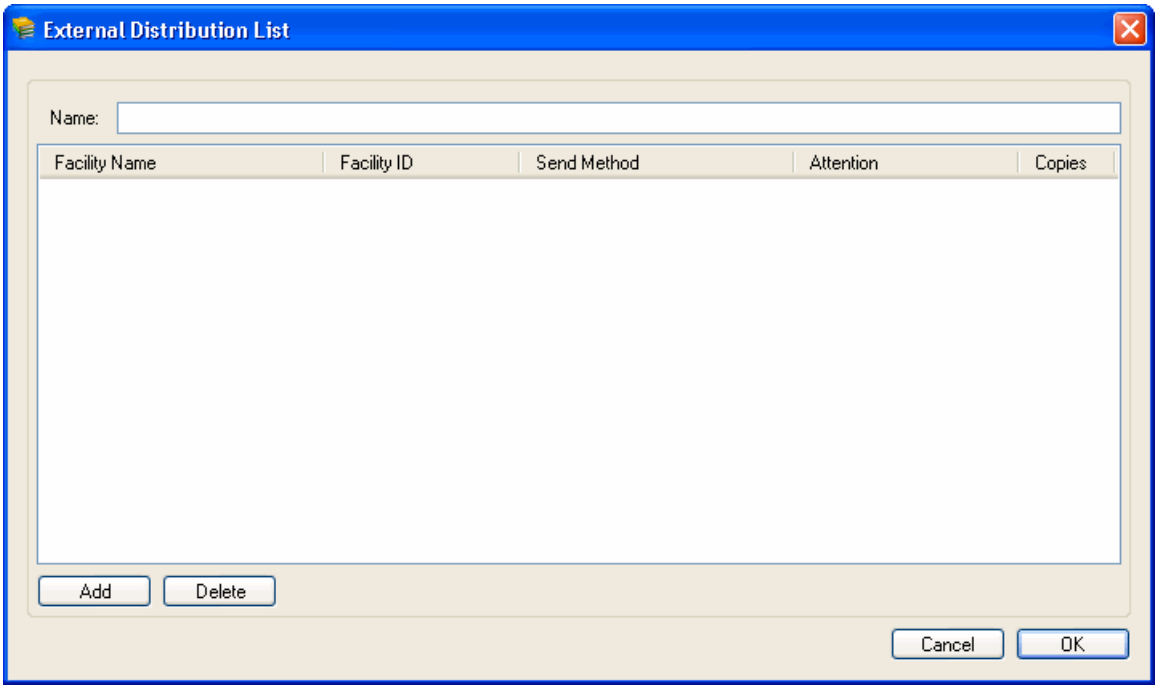
External Distribution

Distribution lists are the key to multiple recipient type transactions. The first time the screen shown above is displayed, there won't be any previously defined distribution lists shown on the dialog beneath the words **External D istribution**. To create one, click **Distribution**, which will bring up the distribution list screen shown below.



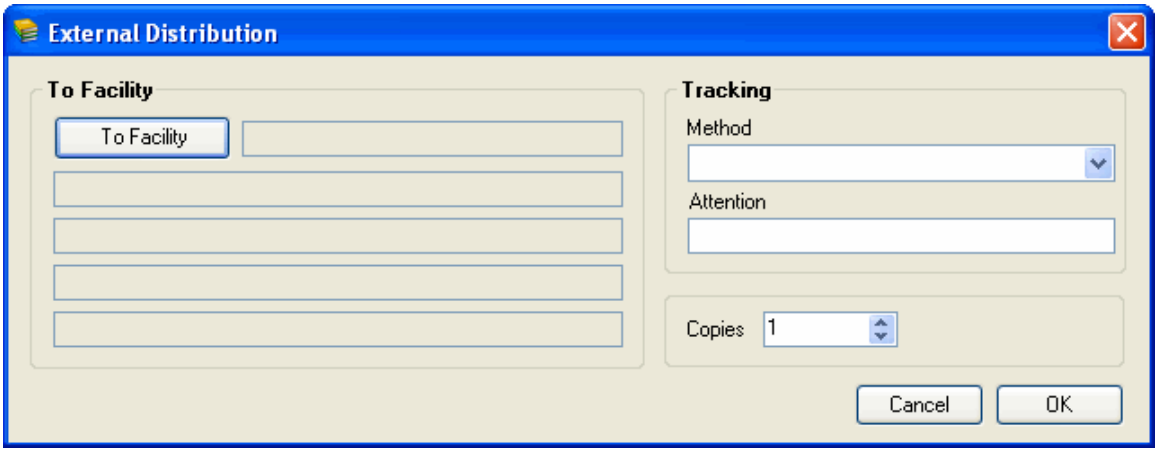
External Transfer Distribution List Screen

Choose Add to create a new external distribution list.

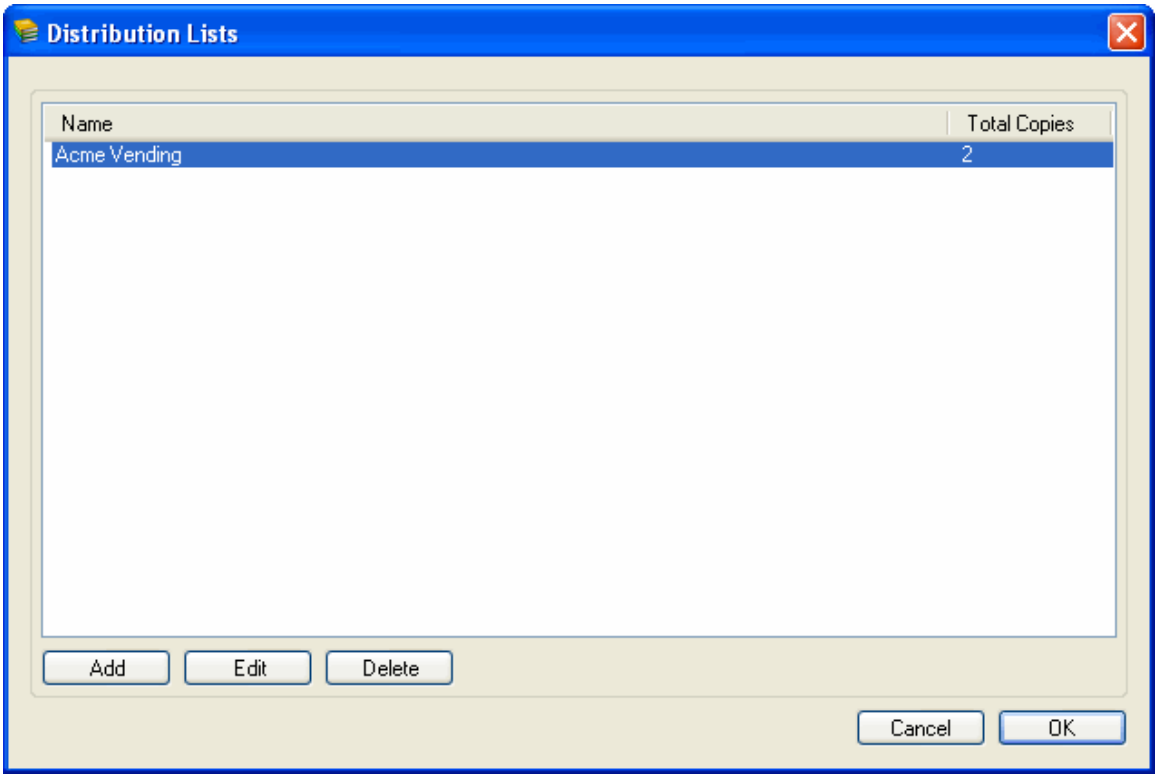


External Transfer Distribution List Entry Screen

Specify a name for the distribution list. After the distribution list has been given a name, add facilities to the list by clicking **Add**, which brings up the screen shown below.



Click **To Facility** and select a facility. You can select the method of transfer by clicking **Method** and then selecting from a standard list. Enter a name in the Attention field. Enter the number of copies.
After the distribution list has been created, click **OK** to exit the Distribution List input screens. The Distribution screen shown below changes to reflect the list that was just created.



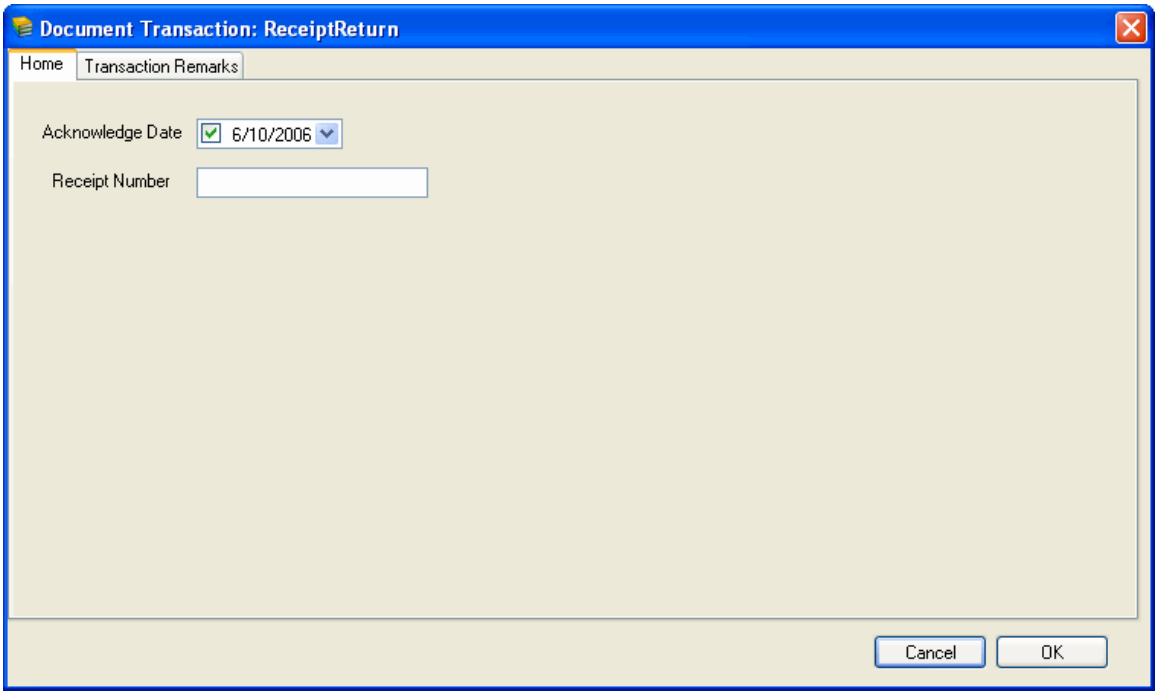
External Transfer Distribution List Setup Menu

After the distribution list has been set up, click **OK** (remember, the number of documents assigned to the recipients on the list must equal the number of selected documents). Initiate the transaction by choosing **OK** in the Document

Transaction: External Transfer dialog.

External Transfer Receipt Return

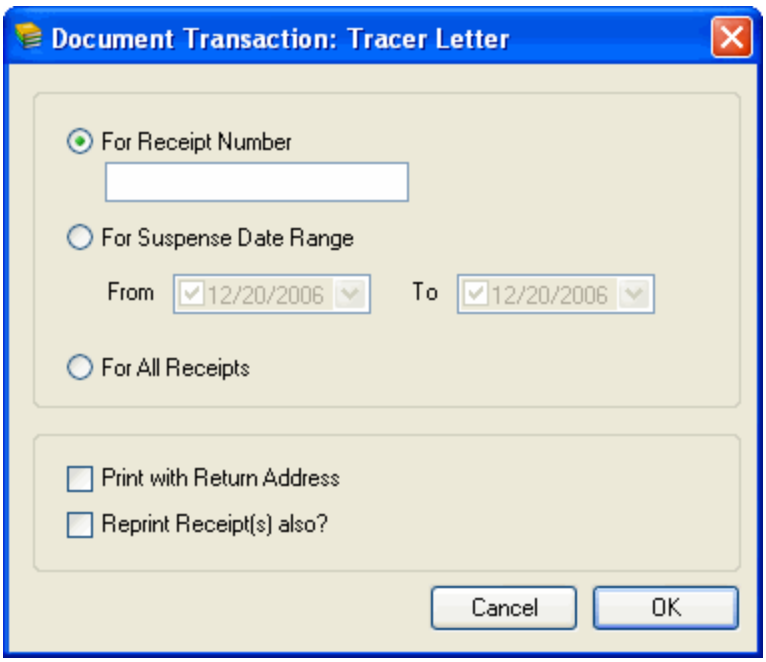
The document external transfer receipt return transaction confirms the receipt by another facility of the documents included in a prior external transfer, and changes the status of these documents from "In transit" to "Received." After selecting this transaction, enter the Receipt Number found on the returned external transfer receipt, as shown below.



External Transfer Receipt Return
Acknowledge Date
Enter the date when the signed transfer receipt was returned to the sending facility.
Receipt Number
Enter the Receipt Number found on the returned external transfer receipt.
Click **OK** when all of the requirements have been fulfilled. The status of all documents referenced by the returned external transfer receipt will be changed from "In Transit" to "Received".

Tracer Letter

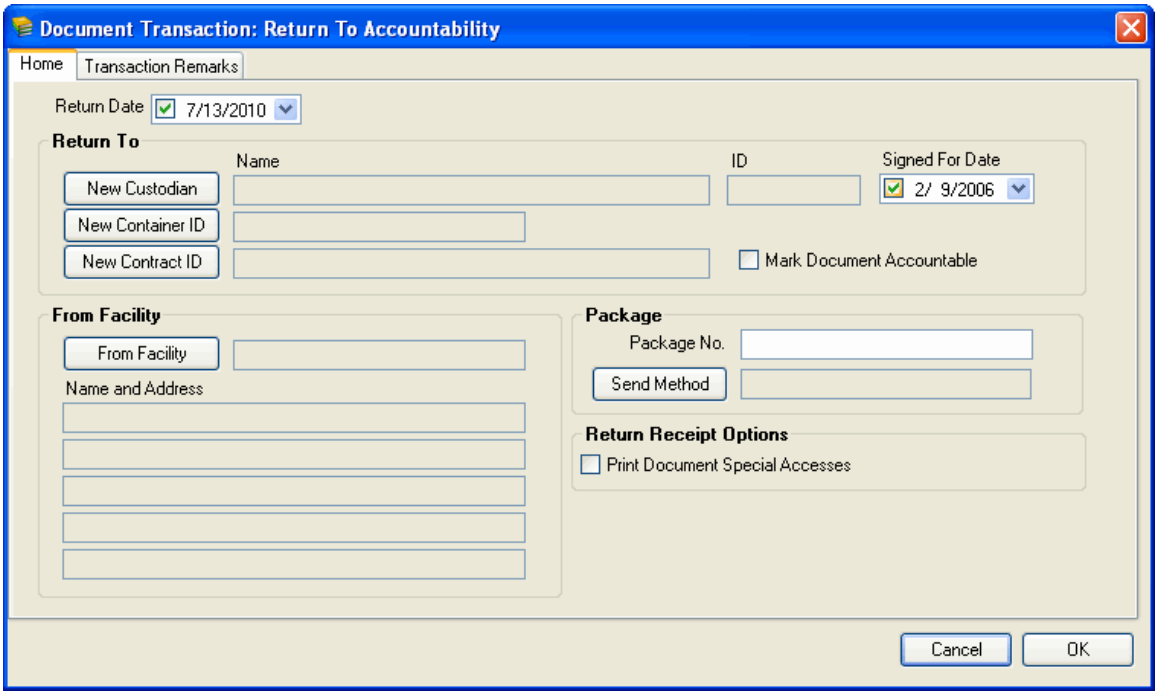
The Document Tracer Transaction searches for all documents, looking for those documents that have been transferred to another facility but are still listed as being "In Transit" and have a "Suspense Date" that is before the current date. Whenever a document is found that meets these criteria, a record is made of the external document transfer receipt number that is associated with the transaction. After the document search has been completed, the document transfer receipt list is sorted and all duplicates are removed. Then, each of the remaining transfer receipts will cause the printing of a tracer letter to the facility to which the document(s) was sent, requesting that follow-up action be taken. If the "Reprint Receipts?" check box, is checked, a duplicate of the original transaction certificate will be printed along with the Tracer Letter.



Select the tracer report options and click **OK** to proceed.

Return to Accountability

The Return to Accountability transaction is used when a facility returns documents that were originally sent out on an external transfer. As shown below, after selecting this transaction, you select the documents to be returned to accountability. All documents are checked against the new custodian for proper clearance level and special access requirements. The system checks the new container's access list for access by the new custodian and for proper clearance level and special accesses.

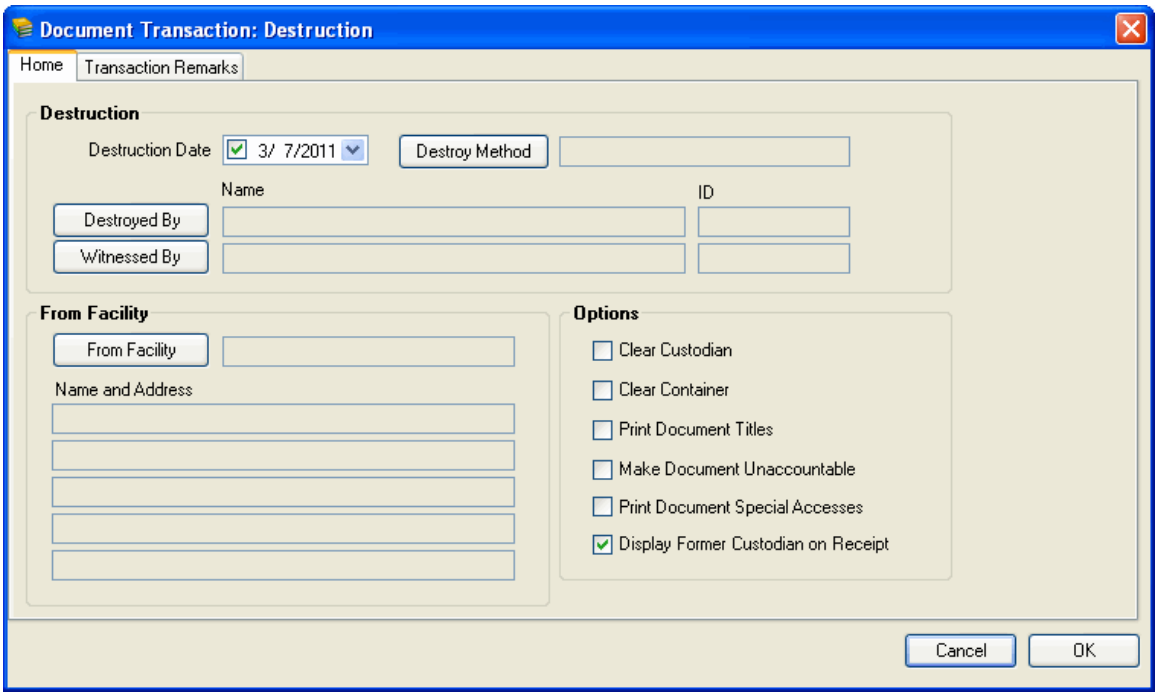


Return to Accountability

Return Date
Enter the date when the documents have been returned.
New Custodian
All documents selected for return are checked against the new custodian for proper clearance level and special accesses. Select a person using a pick list..
New Container
Select a new container by using the container pick list.
New Contract
If a new contract is not selected, it is assumed that the document will not be assigned to a contract (e.g., Working Papers).
Mark Document Accountable
Mark document accountable when performing the return to accountability transaction.
From Facility
To select the From Facility, select the From Facility button and then select a facility in the pick list. The facility must have a Facility ID and at least one address.
Signed for Date
Select a signed for date.
Package No.
Enter a package number.
Method
Select a method.
Print Document Special Accesses
If selected, the document's special accesses will appear on the certificate.
Click **OK** when all of the requirements have been fulfilled.

Destruction Certificate

The Document Destruction Transaction report prints a certificate of destruction and archives and updates the database record for each of the documents listed on the certificate. The options for the destruction certificate are shown below.



Document Destruction Certificate

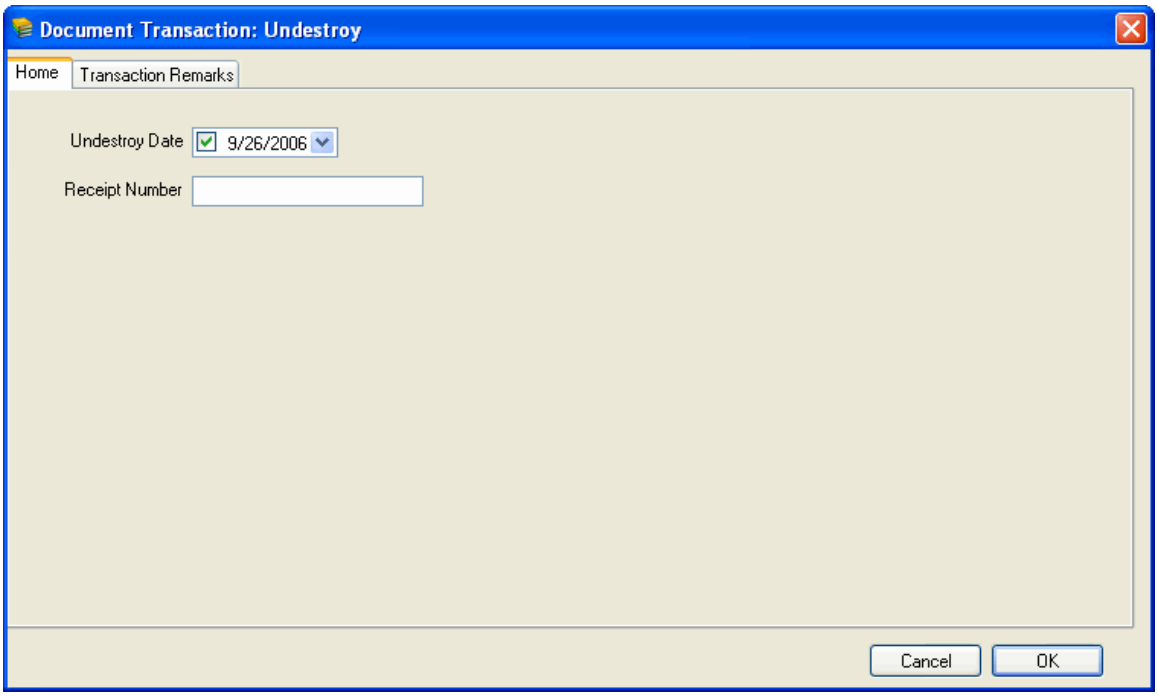
Destruction Date
Enter the date of the destruction.
Method of Destruction
Enter the method of destruction such as burn, shred, etc.
Destroyed By and Witnessed By
One previously authorized person must be selected from the Cleared Personnel or Visitors module as responsible for the destruction. A different, previously authorized person must be selected as the witness to the destruction. On the upper right section on the 'Home' tab of the selected Personnel record, the Authorized To 'Transfer' check box must be checked in order for the personnel record to be selected in the 'Destroyed by' field.

From Facility
To select the From Facility, select the From Facility button and then select a facility in the pick list. The facility must have a Facility ID and at least one address.
Clear Custodian
If checked, the custodian field will get cleared for the documents to be destroyed.
Clear Container
If checked, the container field will get cleared for the documents to be destroyed.
Print Document Titles
If checked, the document titles will print out on the destruction certificate.
Make Document Unaccountable
If checked, the document will be made unaccountable after the transaction.
Click **OK** when all of the requirements have been fulfilled. The documents must pass a validation process for destruction. If a validation does not pass, a message will appear explaining why. If the documents pass all validations, the destruction certificate will print out.
Print Document Special Accesses
If selected, the document's special accesses will appear on the destruction certificate.
Print Former Custodian on Receipt
If selected, the former custodian will appear on the destruction certificate.

Undestroy a Document

If a document was accidentally destroyed using the Document Destruction Transaction, here is a means to recover the document record.

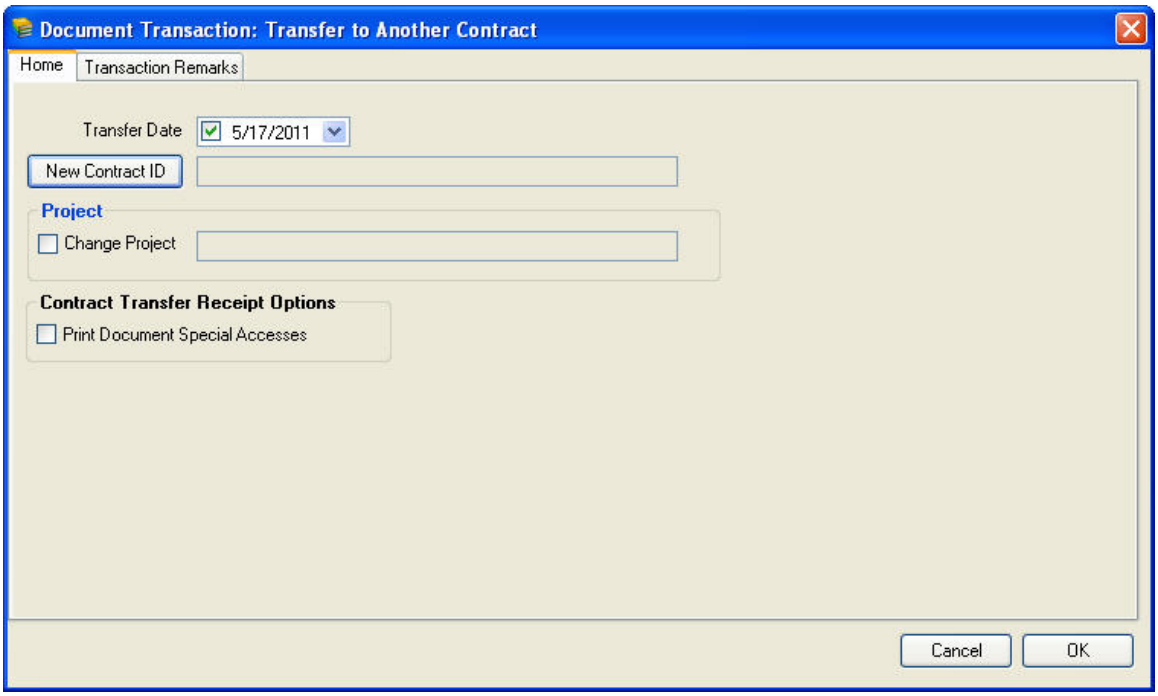
The undestroy transaction allows you to undestroy the entire receipt and not just one document. For example, if there are 3 destroyed documents under one receipt, and you wish to undestroy one of those documents, first undestroy all the documents under that receipt number. Then redestroy the documents that you want to keep destroyed.



UnDestroy Date
Enter the undestroy date.
Receipt Number
Enter the receipt number of the document that you want to undestroy. The receipt number can be found in the Audit Trail information of the document record.
Remarks
Enter any remarks about the transaction.
Click **OK** when all of the requirements have been fulfilled. A confirmation message will appear. Choose Yes to complete the transaction.

Transfer to Another Contract

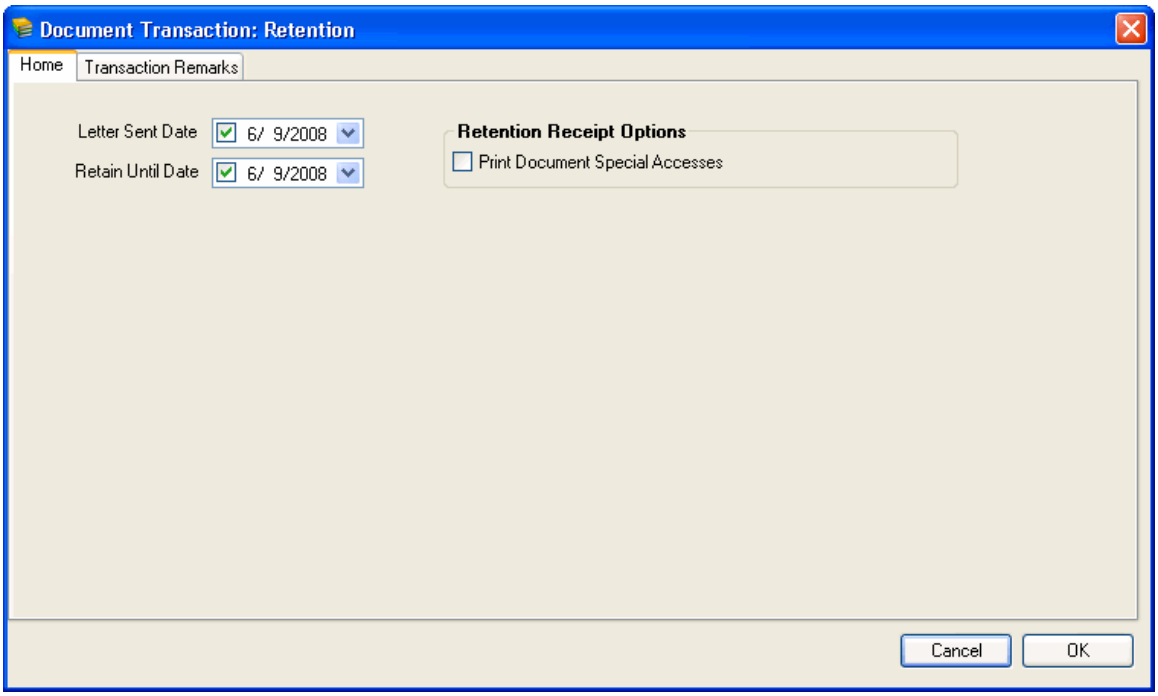
Under current NISPOM guidelines, at the completion of a contract, one of four things must be done to each of the documents assigned to that contract: the document may be destroyed, transferred to another facility, assigned to another contract, or retained beyond contract expiration (assuming that permission has been granted). As shown below, the Transfer to Another Contract transaction is used to transfer documents from one contract to another, as when a contract is being closed out. The selected documents go through a validation process before the transfer takes place, to ensure that the new contract meets the clearance, special access, and document receipt/generation requirements. The update process is automatic if all of the selected documents pass validation.



Transfer to Another Contract
Transfer Date
Enter the transfer date.
New Contract ID
Select the new contract in which the document will be transferred to.
Change Project
If the 'Change Project' check box is checked, enter the new project name. The project field will be updated for all documents in the transaction.
Print Document Special Accesses
If selected, the document's special accesses will appear on the certificate.
Click **OK** when all of the requirements have been fulfilled.

Retention

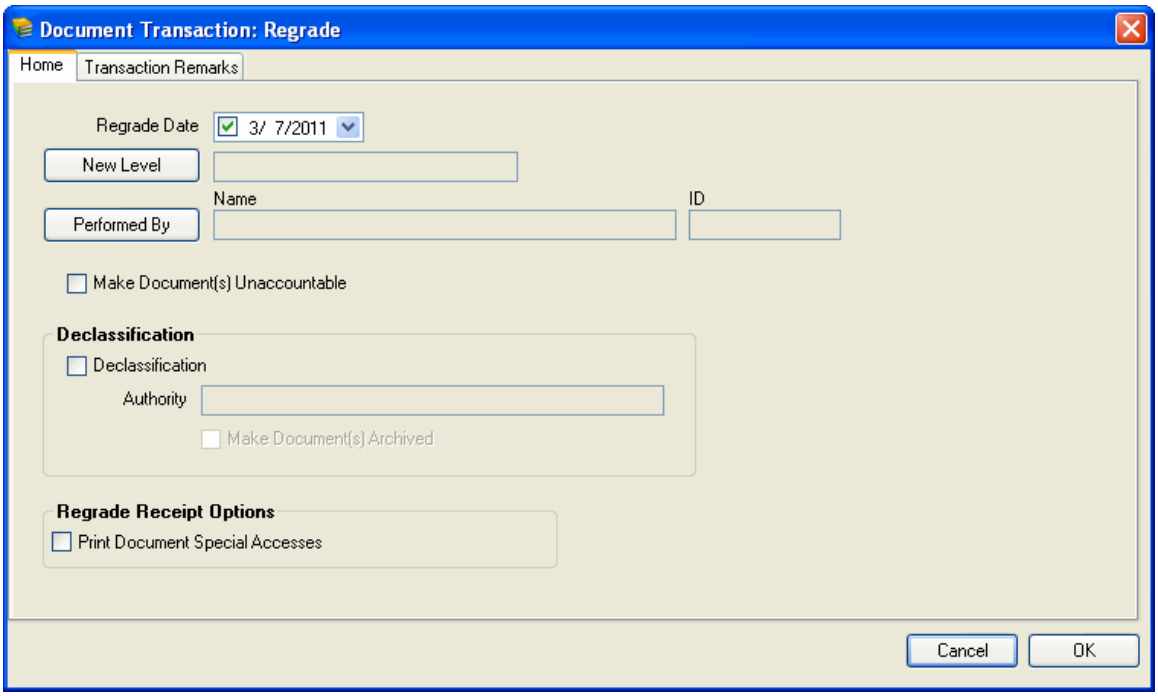
Under current DoD Industrial Security Manual (ISM) guidelines, at the completion of a contract, one of four things must be done to each of the documents assigned to that contract: the document may be destroyed, transferred to another facility, assigned to another contract, or retained beyond contract expiration (assuming that permission has been granted). As shown below, documents to be retained are assigned a Retain Until date.



Retain Until
Letter Sent Date
Enter the date that the letter will be sent.
Retain Until
Enter the retention date.
Print Document Special Accesses
If selected, the document's special accesses will appear on the certificate.
Click **OK** when all of the requirements have been fulfilled.

Regrade Classification

As shown below, the Document Regrade Classification transaction performs a classification level regrading of all selected documents.

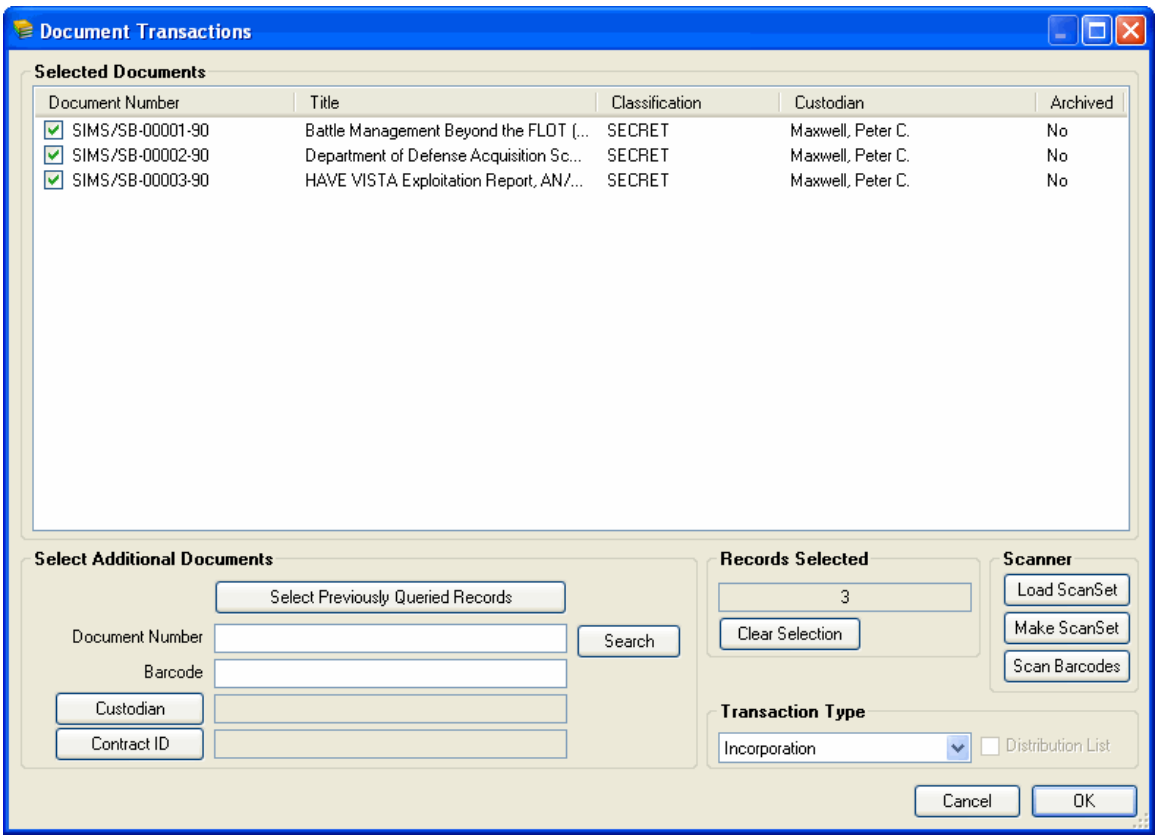


Regrade Classification
Regrade Date
Enter the date of regrading.
Performed by
Select the person performing the regrading.
Make Document(s) Unaccountable
If checked, the document will be made unaccountable. See Classified Documents home page.
New Classification
Select the new classification for all regraded documents.
Authority
If **Declassification** is selected, enter the authority.
Make Document(s) Archived
If checked and after the transaction has completed, the document will be marked as archived. See Classified Documents home page.
Print Document Special Accesses
If selected, the document's special accesses will appear on the certificate.
Click **OK** when all of the requirements have been fulfilled.

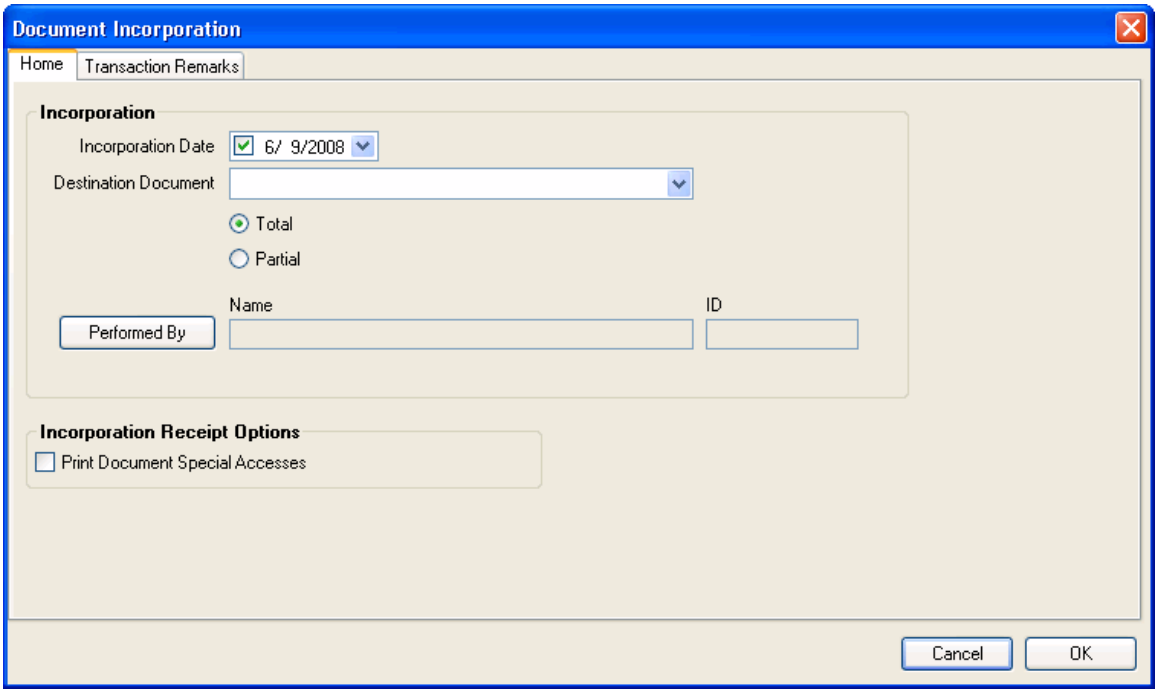
Incorporation

The Document Incorporation transaction allows you to select multiple source documents and a destination document, for incorporation of the source document(s) into the destination document. The Incorporation transaction updates the transaction and remarks information in both the source and destination document records. If the incorporation is total, the source document(s) becomes "archived" and its status becomes "incorporated". Note that you cannot incorporate a source document into a destination document of lower classification level.

First select the destination and source documents in the output list. Then select the Incorporation option in the Reports menu. The following dialog will display:



After selecting OK, the Document Incorporation dialog will display. To do the transaction, select the destination document.



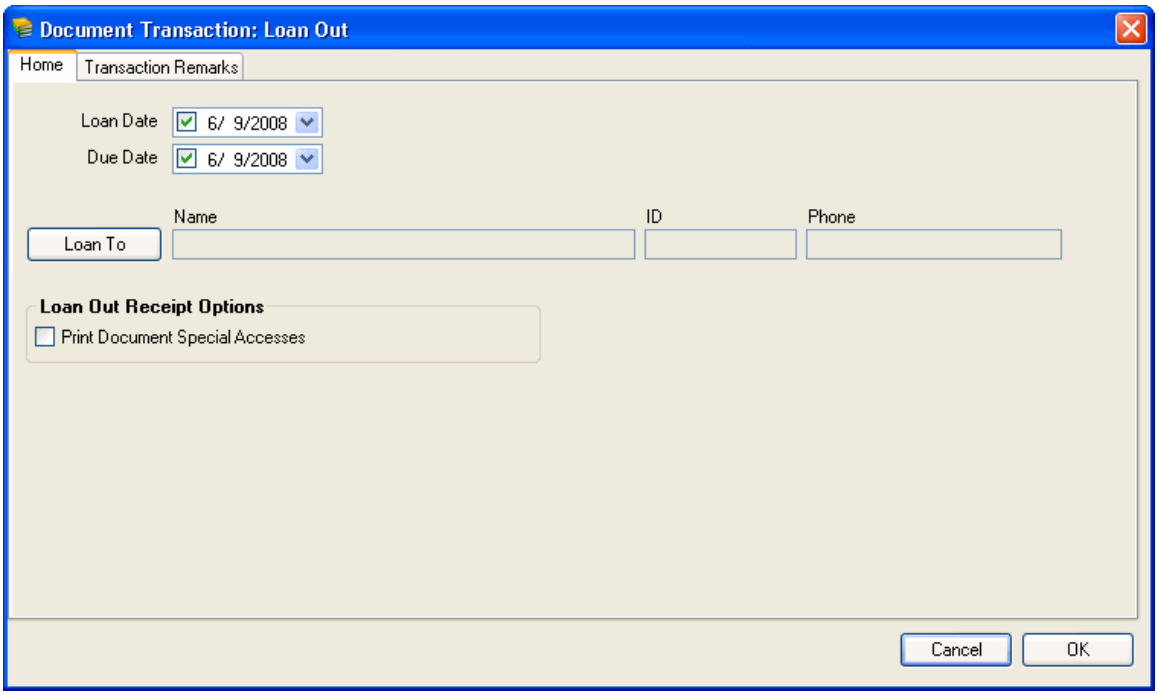
When the transaction is done, each document will have the appropriate information entered into its Audit Trail record. The destination document's Audit Trail record lists all the incorporated documents in the Remarks field.

If the Incorporation is total, then all source documents will be automatically archived.

Incorporation Date
Enter the date of incorporation.
Destination Document?
Select the target document for the incorporation.
Total or Partial?
Select either a total or partial incorporation.
Performed by
Select the person performing the incorporation.
Print Document Special Accesses
If selected, the document's special accesses will appear on the certificate.
Click **OK** when all of the requirements have been fulfilled.

Loan Check Out

The Document Loan Check Out transaction allows selected documents to be loaned.

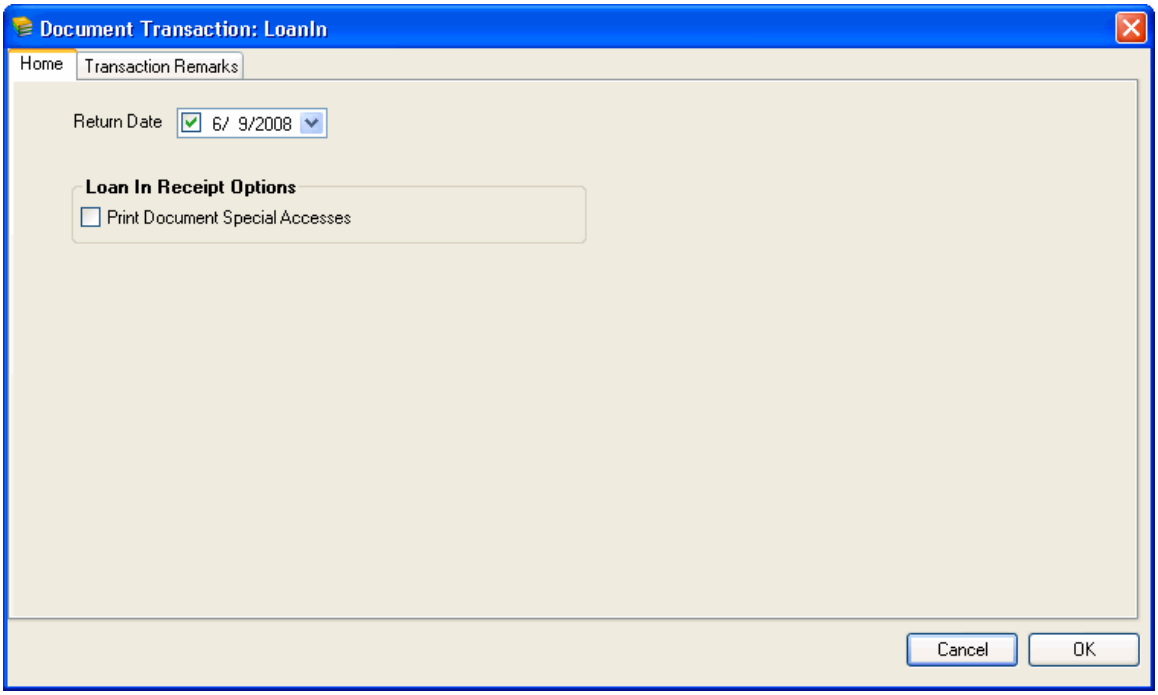


Loan Check Out
Loan Date
Enter the date that the document(s) are being loaned.
Due Date
Enter the date when the document(s) are due back.
Loaned to
Select the person to whom the document(s) is being loaned.
Remarks
Enter any remarks to appear on the report.
Print Document Special Accesses
If selected, the document's special accesses will appear on the certificate.
Click **OK** when all of the requirements have been fulfilled.

Loan Check In

The Document Loan Check In transaction allows selected documents to be returned. Note that only documents

currently checked out can be checked in.



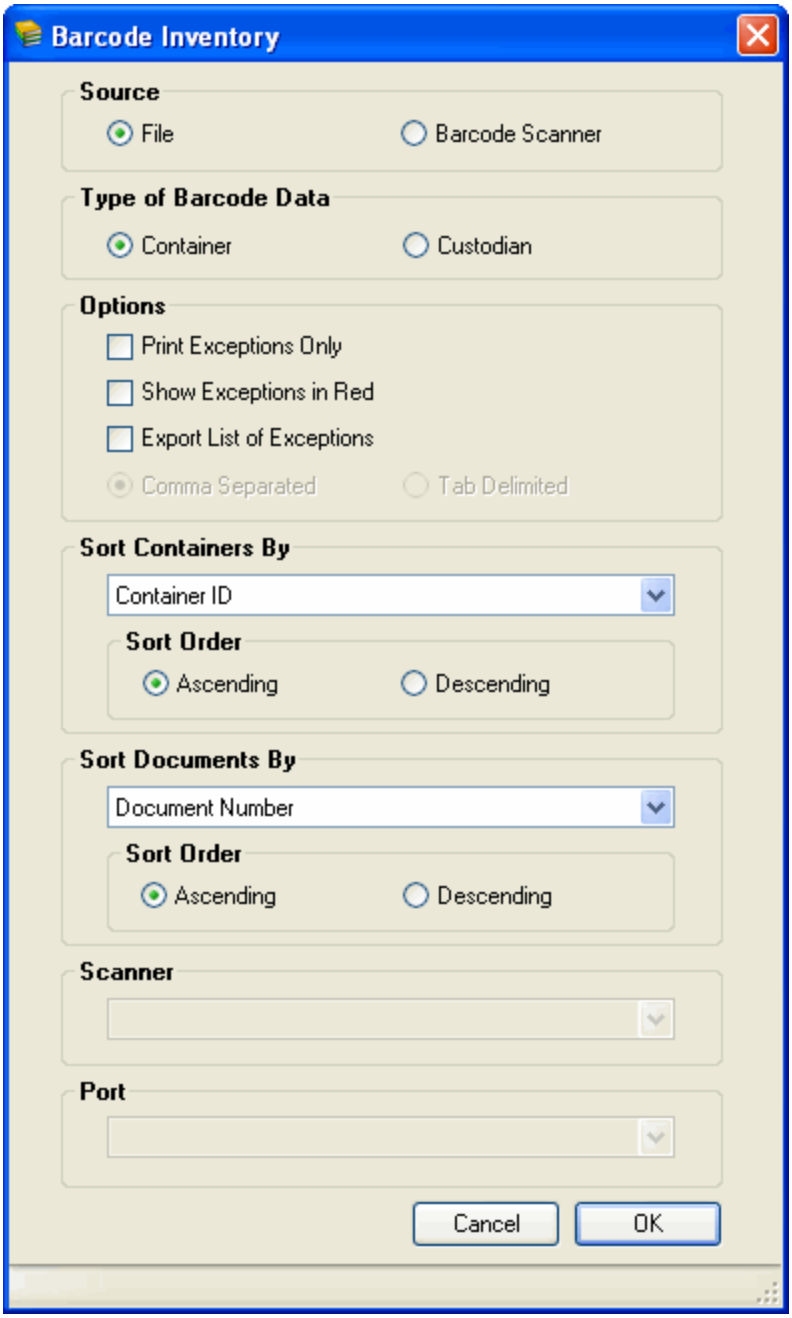
Loan Check In
Return Date
Enter the date when the document(s) are being checked in.
Remarks
Enter any remarks to appear on the report.
Print Document Special Accesses
If selected, the document's special accesses will appear on the certificate.
Click **OK** when all of the requirements have been fulfilled.

Barcode Inventory

Barcode Inventory
This transaction performs an inventory of all documents assigned either to specific containers or specific personnel and provides the following information, based on the data downloaded from a portable barcode scanner:

- Identification of the containers or personnel found and whether or not they coincide with those found in the Secure Containers or Cleared Personnel databases.
- Identification of all documents that were found in each container and whether they were in the correct container, or identification of all documents found for each person and whether they were assigned to the correct person.
- A list of all missing documents from each container or person scanned.

The user must choose the source of the downloaded barcode data, as shown below.



Select "Read Barcode From Disk" if a file was previously downloaded and saved. If a leading period appears in the barcode inventory file, the period can be filtered by enabling an option in the System Customization Documents tab. If the data was not previously downloaded and a Top Gun scanner is being used, then select "Read Barcode From Scanner" and download the file. See Barcode Scanning for additional instructions on how to scan barcode labels and download the barcode data.

If you check **Print Exceptions Only**, then only documents that do not belong in the inventory or were not found will be printed. This can save a considerable amount of time and paper when printing the reports. Turn on/off the option to group by custodian.
Select the serial port that the scanner is attached to.

After choosing OK, a receive dialog will appear. Select the time-out and then choose the Receive button. The data is then processed and the report printed. Please be patient, as this inventory may take some time, depending on the size of the barcode file.

Barcode Scanning Introduction

This section provides information on TopGun, and how to perform barcode inventories of Classified Documents or AIS hardware. Barcode scanning is also supported by the SocketMobile scanner.

Barcode Scanning with the TopGun

The TopGun barcode scanner can be used as either a fixed-station keyboard wedge or a portable barcode device. It should be noted that the device is designed to require a password, in order to use the device to collect barcode information. Please refer to the appropriate section of the TopGun User's Manual for detailed instructions on:

- Getting Started, Installing Batteries, & Recharging
- Setting the date & time
- Setting a password
- Using the device as a keyboard wedge
- Using the PALPRO Application ASSETPRO
- Uploading collected information to the PC using the Portable File Transfer Program (PTFER)

If you have forgotten the TopGun's password and need to reset things back to the initial default values, print and scan the following barcode:

+.

Fixed-Station Keyboard Wedge Device
When used as a fixed-station keyboard wedge, the barcode data will be presented directly to SIMS, for use in identifying documents for various transactions (e.g., destruction, transfer, etc.). Please refer to the appropriate chapter of the TopGun User's Manual for detailed instructions on connecting the necessary cables between the TopGun and the PC, to use it as a keyboard wedge device.

Portable Barcode Scanning Device
When the TopGun is to be used as a portable barcode device, the barcode data collected must first be collected and then downloaded to the PC, prior to performing a barcode inventory report of either classified documents or AIS hardware.
The TopGun barcode scanner comes pre-programmed with PALPRO, which contains a variety of barcode data collection programs. The PALPRO barcode data collection program that is compatible with SIMS is called ASSETPRO. To use ASSETPRO to collect barcode inventory information for use with SIMS, follow the following steps:

1. After you have first turned on the TopGun and have entered the appropriate password, under PALPRO OPTIONS press the F2 key to "SELECT PROG".
PALPRO OPTIONS
F2=SELECT PROG
F3=WEDGE
F4=PASSWORD

2. Press F1, to select the ASSETPRO program.
F1=ASSET MGMT
F2=INV MGMT
F3=ITEM TRACKING
F4=EXIT

3. To change the application's title or prompts, select F3 and follow the instructions below. Otherwise, select F4 and

skip to step 4.
CHANGE PROMPTS?
F3=YES
F4=NO
Enter a new name for the ASSETTPRO program, such as **SIMS INVENTORY**, followed by the ENTER key.
ENTER APPL TITLE
Enter the text that you want to use for the first prompt, such as **CONTAINER BARCODE**, followed by the ENTER key.
ENTER PROMPT 1
Enter the text that you want to use for the second prompt, such as **DOCUMENT BARCODE** followed by the ENTER key.
ENTER PROMPT 2

4. Select F2, to begin the barcode data collection operation.
ASSET MGMT
F2=COLLECT
F3=FILE OPTIONS
F4=EXIT

5. The first prompt will next appear on the screen (you may have modified it in step 3 above to be something other than that shown below…perhaps to be CONTAINER BARCODE). Scan the barcode of a safe/container or type in the safe/container barcode I.D. If you type in the I.D., you will need to press the ENTER key.
LOCATION ID
F3=REV F4=EXIT

6. The second prompt now appears on the first line of the screen (you may have modified it in step 3 above to something other than that shown below…perhaps to be DOCUMENT BARCODE), and the safe/container barcode scanned in step 5 above appears on the third line.
ITEM ID
C12345
F3=REV F4=EXIT

Scan the barcode identifying the document, or use the keypad to enter the document's barcode I.D. If you type in the I.D., you will need to press the ENTER key. The location and item I.D.'s (safe/container and document I.D.'s) appear together on the third line of the screen, separated by a comma, and the second prompt remains on the screen. The barcode scanner is now ready to accept another document barcode for the current safe/container.
ITEM ID
C12345, D45678
F3=REV F4=EXIT

7. When you finish collecting document barcodes for the current safe/container, press the F4 key to return to the first prompt, where you can either specify a new safe/container.

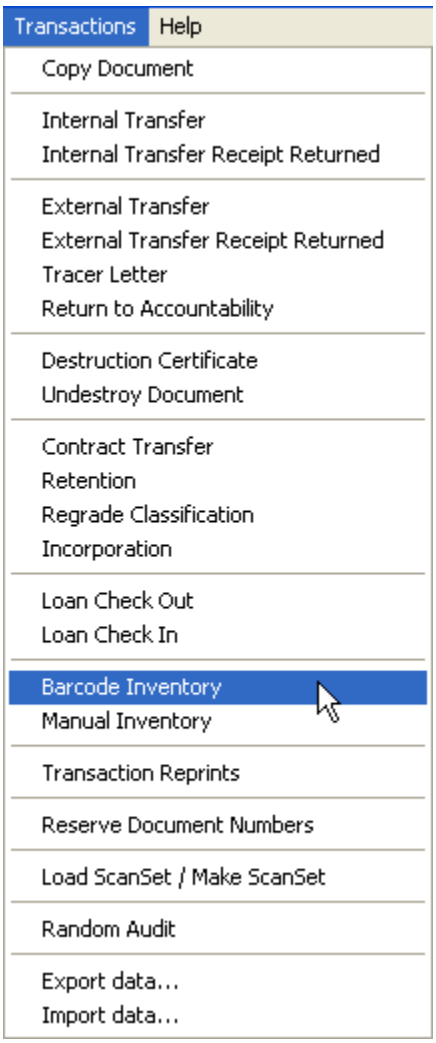
8. Repeat steps 5 through 7 until you have collected barcode I.D.s for all documents at all safe/container locations to be inventoried. Then press the F4 key to return to the application menu.
The TopGun barcode scanners store the collected barcode data in a single ASCII text file. When you download the file to your PC, the data appears as a list. Each line in the list contains two fields separated by a comma. The first field is the safe/container barcode I.D., and the second field is the document barcode I.D. A sample data file appears below, for inventories of two safes, each with five documents.
C12345,D00001
C12345,D01231
C12345,D10456
C12345,D28904
C12345,D16793

C45774,D87442
C45774,D66335
C45774,D22778
C45774,D56489
C45774,D14773

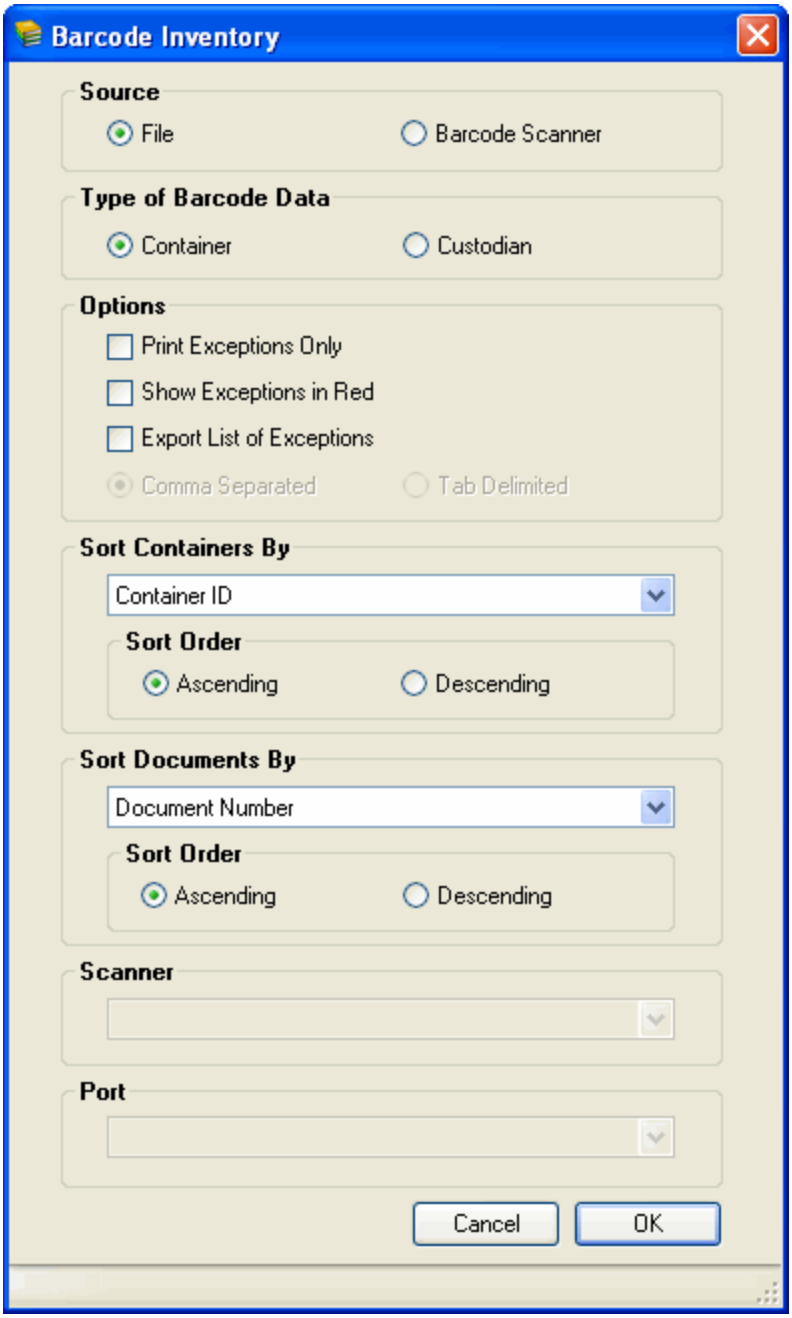
Downloading Barcode Data from the TopGun Barcode Scanner

After you've scanned a series of safe/container and document barcodes, you can download the information to your PC for subsequent inventory reporting by SIMS (see Barcode Inventory). The TopGun barcode scanner comes with the Portable Applications Library (PAL) on a diskette. You can also use the PTFER (Windows) file transfer utilities to download the previously collected barcode data to your PC.

Downloading Directly from the SIMS Application
Select the Barcode Inventory report from the Reports menu in the Classified Documents module.



A dialog as shown below will appear.



Select "Barcode Scanner" as the source of barcode data. The TopGun scanner comes with a 00-884-28 cable that should be used to connect the scanner to the computer's RS-232 serial port and that port should be selected as COM1, COM2, COM3 or COM4, depending on which COM port has been assigned to the RS-232 serial port.

Press the F3 key on the TopGun to select the File Options choice, from the menu shown below.
ASSET MGMT
F2=COLLECT
F3=FILE OPTIONS
F5=EXIT

Press the F2 key on the TopGun to select the Send File choice from the menu shown below.
FILE OPTIONS

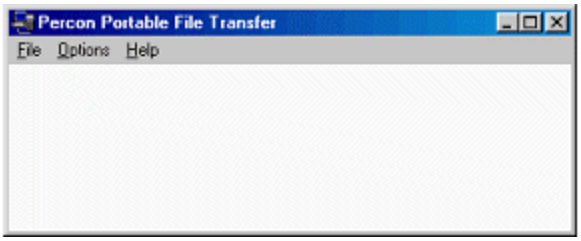
F2=SEND FILE
F3=ERASE FILE
F4=EXIT

Click on the OK button on the SIMS Barcode Options dialog. In the receive dialog, specify the time-out period, and then select the receive button to have the application begin to look for downloaded barcode information.

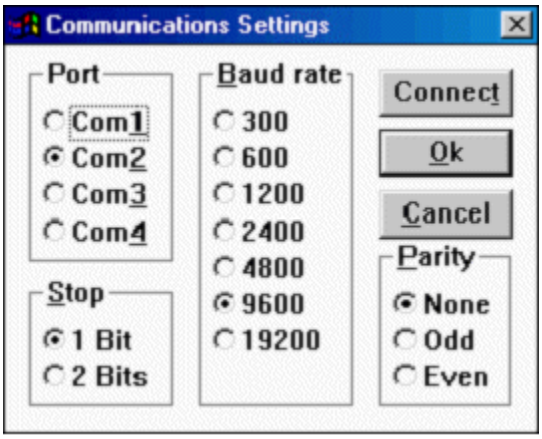
Press The F2 key on the TopGun to select the Serial option from the menu shown below to begin the file transfer.
SEND FILE
F2=SERIAL
F3=WEDGE
F4=EXIT

Using PTFER for Windows
To prepare for a data transfer between your Windows PC and the TopGun barcode scanner, complete the following steps:
1. If the utility software is not already installed on your PC, install it following the instructions included with the diskette packaged with the TopGun barcode scanner.

2. In Windows, launch the PTFER program by double-clicking on the PTFER icon. A blank PTFER windows opens, as shown below.



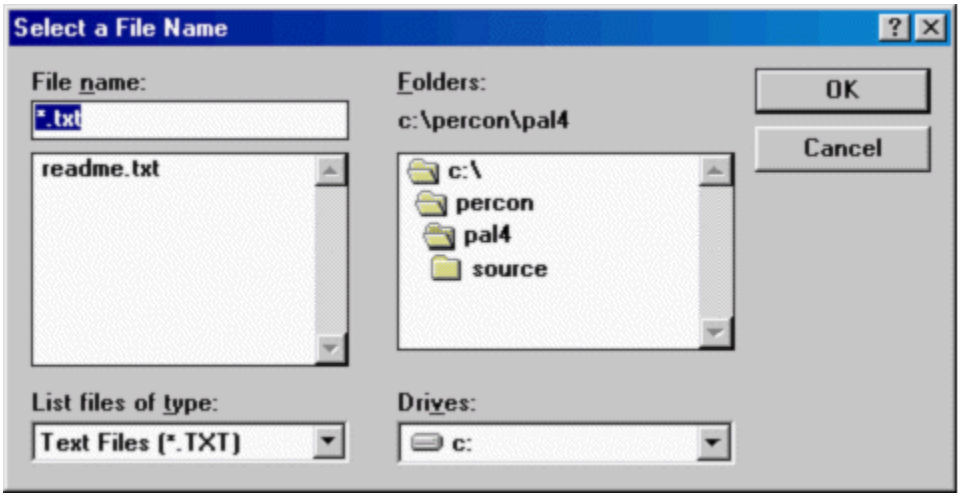
By default, PTFER uses COM2 as the communications port. If you need to switch to a different port or make other changes to the defaults, select **Options -> Settings** from the PTFER menu. The Communications Settings dialog shown below will appear, where changes can be made.



3. Select **Options -> Connect** (or click on the **Connect** button in the Communications Settings dialog box) to connect with the selected port. The message "Communications port opened" appears in the window. You are now ready to transfer files between your PC and the TopGun barcode scanner.

4. To download a file from the TopGun barcode scanner, select **File -> Receive** from the PTFER menu and use the

File to Receive dialog as shown below, to specify the name and location of where you want to store the downloaded file.



PTFER then displays a message saying that it is expecting the file.

5. Plug the TopGun or barcode scanner into the appropriate communications port on the PC (COM1 or COM2, as selected in step 2 above), using the PERCOM cable number 00-884-19 (25 pin) or 00-884-28 (9-pin).

6. From the ASSETPRO program menu shown below, select F3 to display the File Options menu.
ASSET MGMT
F2=COLLECT
F3=FILE OPTIONS
F4=EXIT

7. Select F2 to display the Send File menu.
FILE OPTIONS
F2=SEND FILE
F3=ERASE FILE
F4=EXIT

8. Select F2 to download the barcode data through the serial port connection.
SEND FILE
F2=SERIAL
F3=WEDGE
F4=EXIT

9. After successfully downloading the barcode data to the PC, the file in the TopGun may be erased by selecting F3 from the menu shown below.
FILE OPTIONS
F2=SEND FILE
F3=ERASE FILE
F4=EXIT

10. Turn the TopGun off by pressing the green I/O button. This will turn off the screen display, but it will not clear any information in the portable's random-access memory (RAM). The portable is programmed to shut itself off automatically if you do not use it for ten minutes.

Barcode Scanning with the Datalogic Memor

This section provides information on Datalogic Memor, and how to perform barcode inventories of Classified Documents or AIS hardware.
The Datalogic Memor barcode scanner can only be used as a portable barcode device. It cannot be used as a fixed-station barcode scanner.

If SIMS Standalone or SIMS Lite was installed on your workstation computer, the Datalogic Memor Scanner USB driver was automatically installed. If that driver has been subsequently removed, then it can be reinstalled from the SIMS installation CD or the Datalogic Memor CD. Additionally, when SIMS Standalone or SIMS Lite, either Microsoft ActiveSync 4.5 or Microsoft Mobile Device Center 6.1 was installed, depending on whether your computer's operating system is Windows XP/2000/2003 or Windows Vista, respectively.

When running SIMS Multi-user Client (versions 7.5.32 and earlier), Microsoft ActiveSync 4.5 will need to be manually installed. The drivers cannot be installed automatically when using ClickOnce. ActiveSync 4.5 can be installed using the SIMS multi-user installation CD. If a SIMS Multi-user Client version released after 7.5.32 was installed, either Microsoft ActiveSync 4.5 or Microsoft Mobile Device Center 6.1 will be installed automatically.

Hardware Installation

Connect the Datalogic Memor scanner's USB cable to your PC's USB port. Turn on the device and confirm the screen shown below appears on the scanner display.



Your computer's operating system will detect the scanner now that the USB cable is connected and the device is turned on. The driver, having been installed automatically in the previous section, will be detected automatically.

The Windows operating system should recognize the device as Datalogic USB if the driver has been installed correctly. At this point, Windows will ask you which driver you would like to use for this device. Please select to browse and under ActiveSync drivers directory (e.g. C:\Program Files\Microsoft ActiveSync\drivers) select the file wceusbsh.sys.
Microsoft ActiveSync will detect your scanner and prompt you to establish a partnership between the device and your PC. When the following dialog appears, leave **Yes** selected and click **Next**.

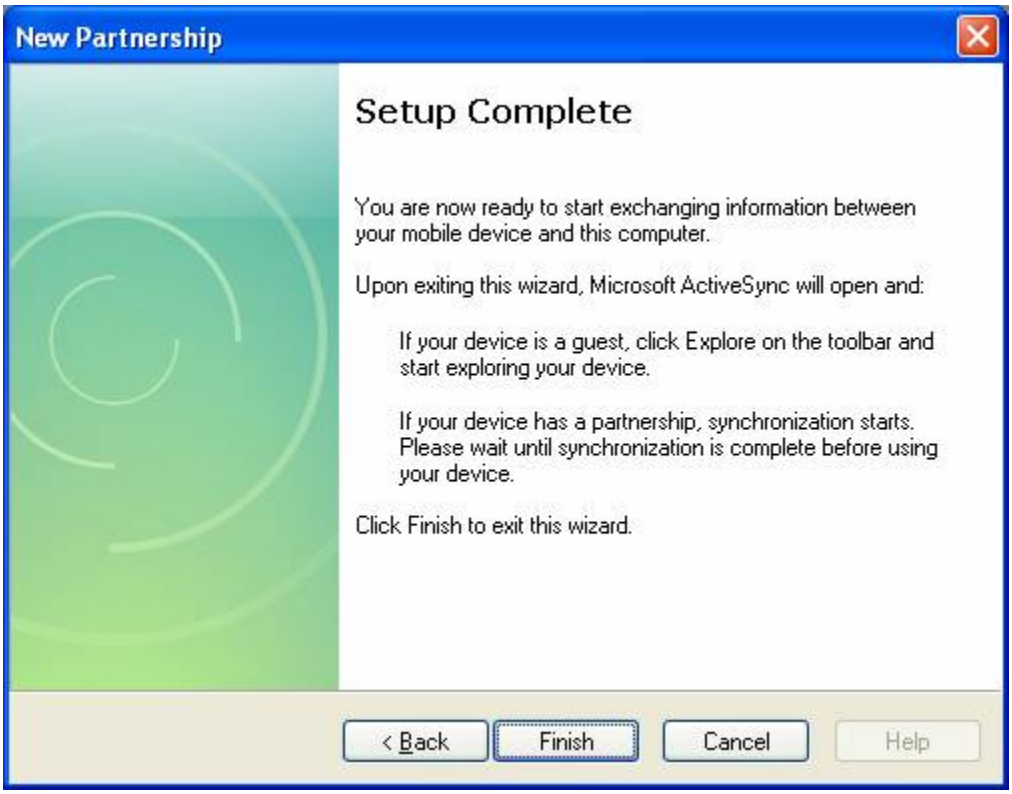
Microsoft's ActiveSync utility can synchronize your Microsoft Outlook Calendar, Contacts, and Tasks with a mobile device. Those three items are optional and are not required by SIMS. The only required option for SIMS is **Files**. Make sure **Files** is selected and click **Next**.

You may receive the following dialog:

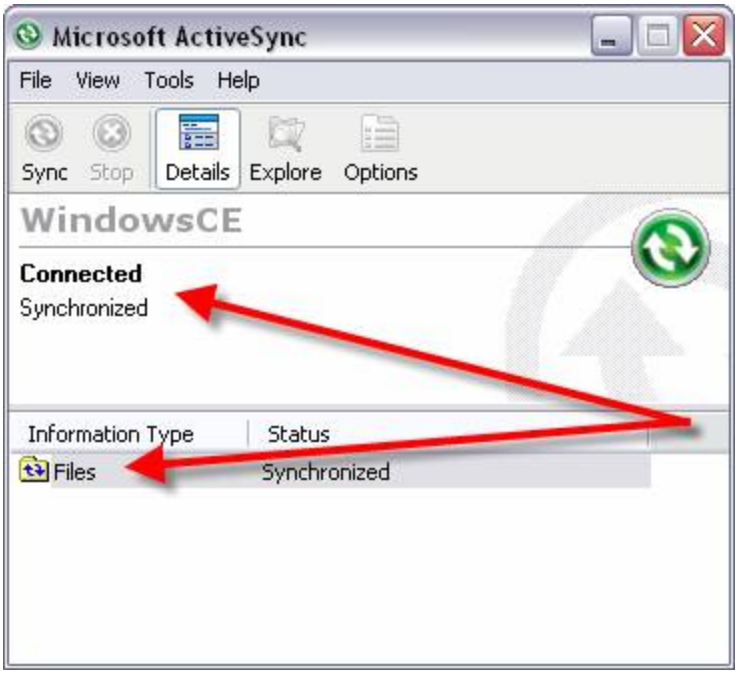

File Synchronization
A Synchronized Files folder will be created on your desktop computer.
Place files that you want to synchronize into this folder.
Microsoft ActiveSync may need to convert files when synchronizing between your mobile device and this desktop computer. Note: A converted file may not contain all information found in the original file.
OK
Help

This indicates the data transferred from the scanner will be stored in a folder on your desktop. If you need to change the destination, click **OK** to close the dialog, then highlight **Files** and click the **Settings…** button.

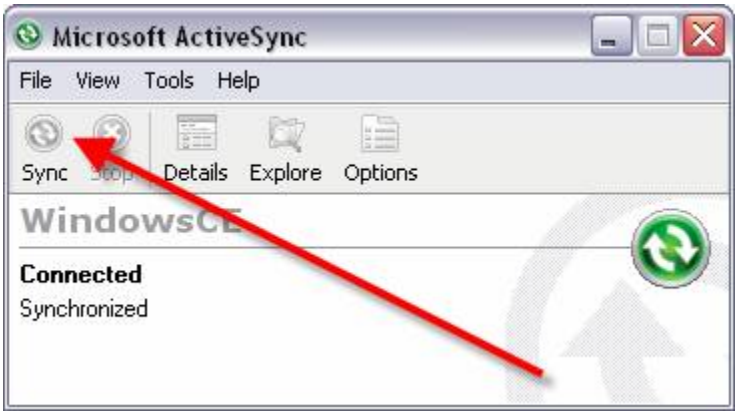
After clicking **Next**, you will receive the following dialog confirming that installation is complete. Click **Finish**.


New Partnership
Setup Complete
You are now ready to start exchanging information between your mobile device and this computer.
Upon exiting this wizard, Microsoft ActiveSync will open and:
If your device is a guest, click Explore on the toolbar and start exploring your device.
If your device has a partnership, synchronization starts. Please wait until synchronization is complete before using your device.
Click Finish to exit this wizard.
< Back
Finish
Cancel
Help

The following window will appear after a successful installation:

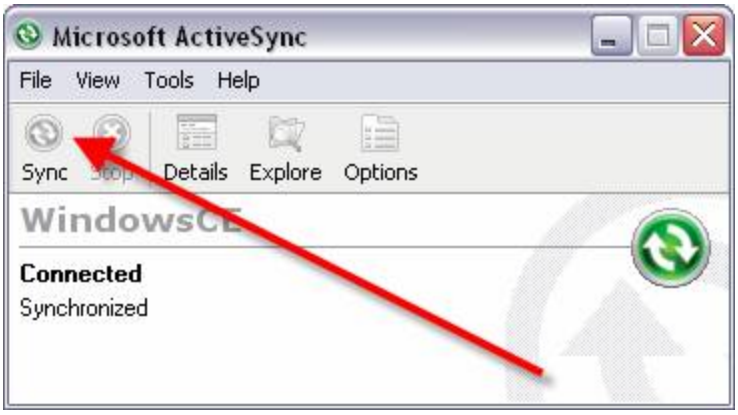


To perform a synchronization and transfer data from the scanner to your PC, click on the **Sync** button.



You can locate the Microsoft ActiveSync console by clicking on the following System Tray icon:





If this scanner will only be used on a single PC, leave the **Yes** option selected and click **Next**.If this scanner will be used on multiple PCs, select the **No** option and click **Next**.

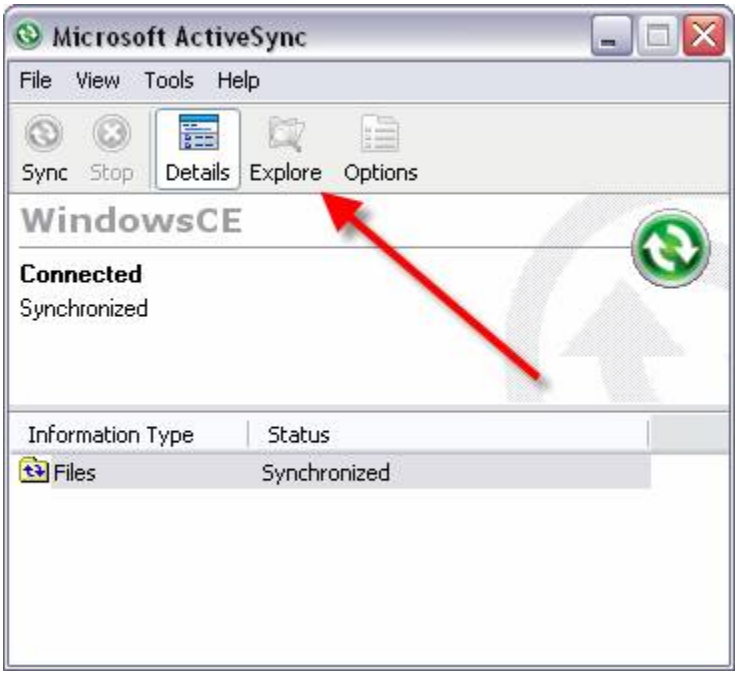

New Partnership
Select Number of Partnerships
Select whether you want to synchronize with just this computer.
Your device can have up to two partnerships or a partnership with only this computer. Do you want your device to have a partnership and synchronize with only this computer?
Yes, I want to synchronize with only this computer
Remove any existing partnerships on my device and set up a new partnership with just this computer.
No, I want to synchronize with two computers
Set up a partnership with this computer, but do not remove any existing partnerships on my device.
< Back
Next >
Cancel
Help

Scanner Configuration

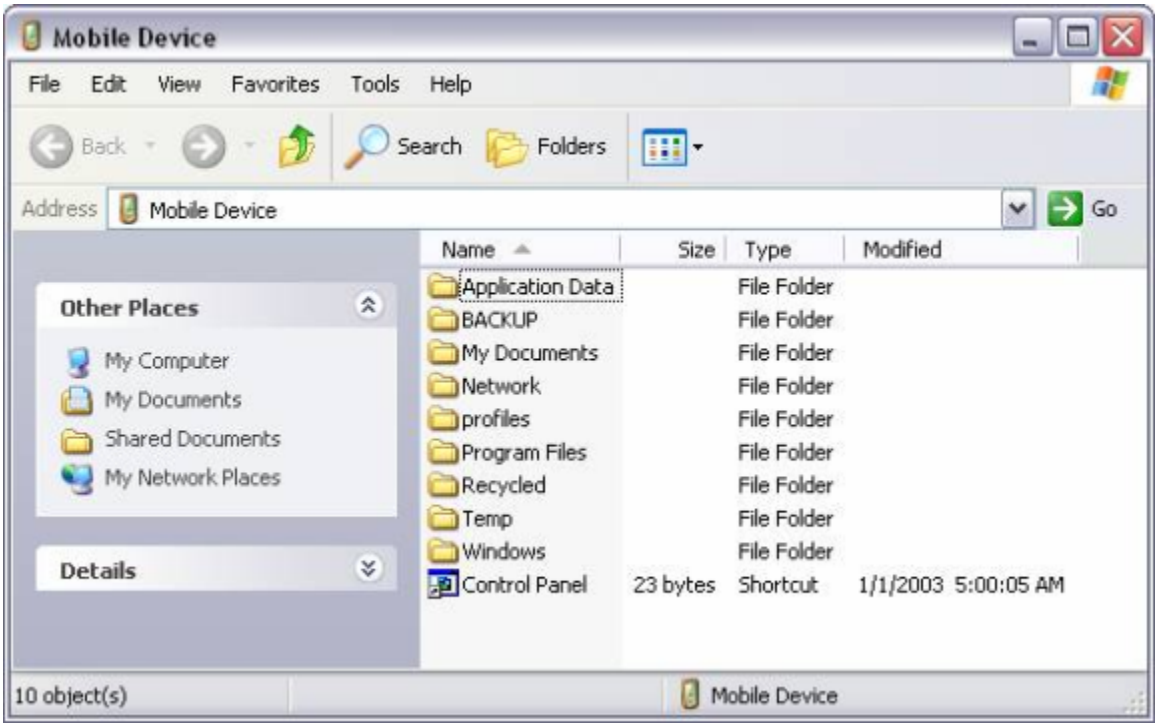
A special SIMS barcode utility must be installed on your USB scanner. If you purchased your scanner from SIMS Software, it should arrive with the utility already installed. If you purchased your scanner from a 3rd party, you must follow the steps in this section to install the barcode utility.
Start by opening Microsoft ActiveSync. You can locate the utility in the System Tray:



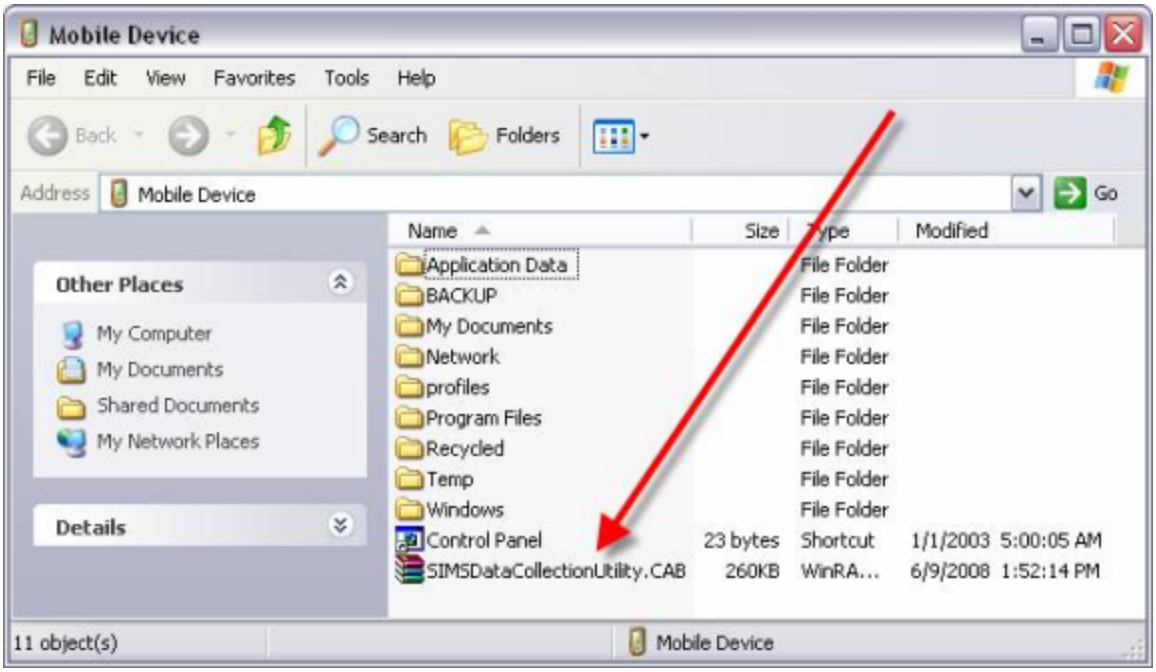
Click **Explore** in ActiveSync toolbar.



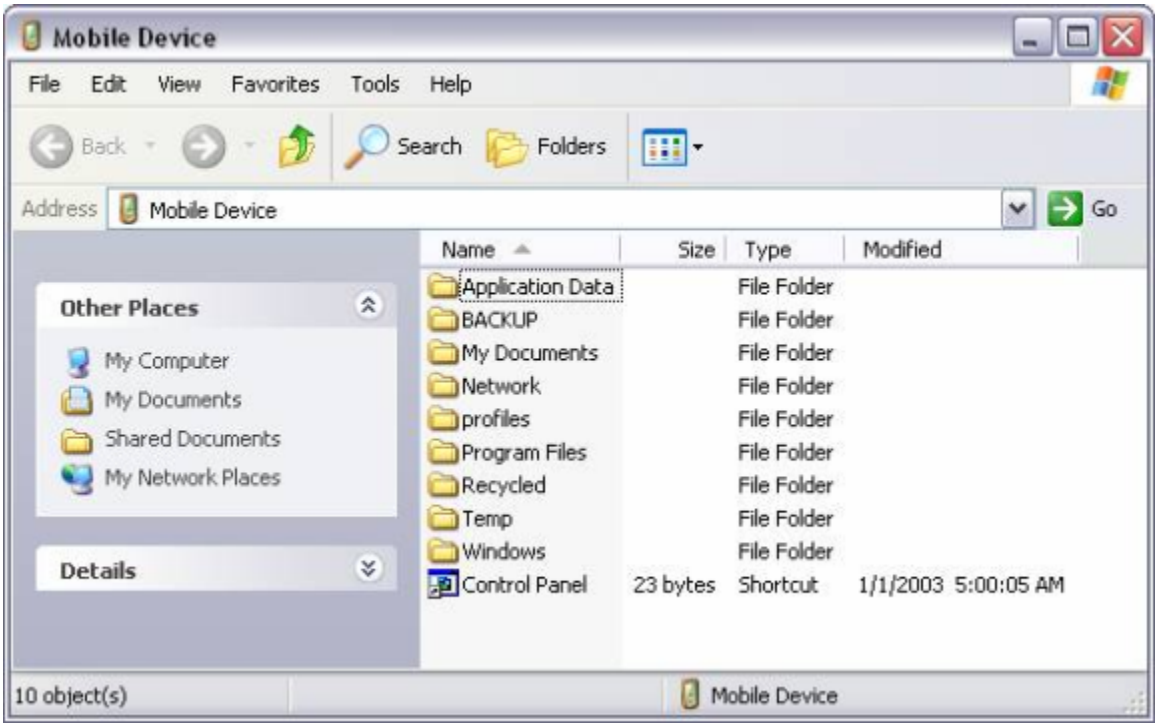
This will open a Windows Explorer window showing the file structure on your mobile device.



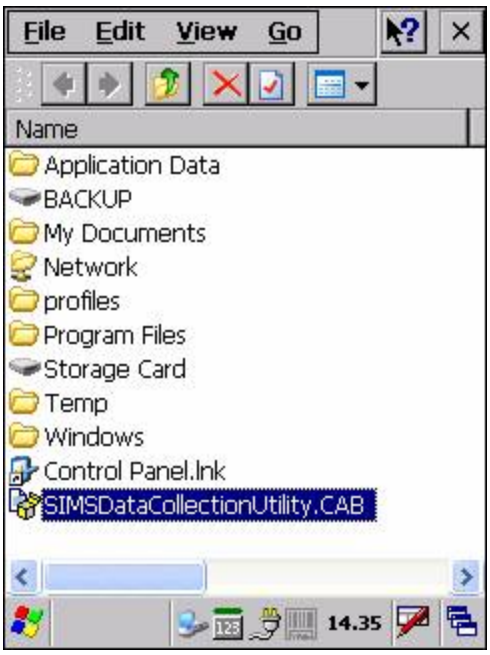
Copy (drag-and-drop) the file **SIMSDataCollectionUtility.cab** file to this window.



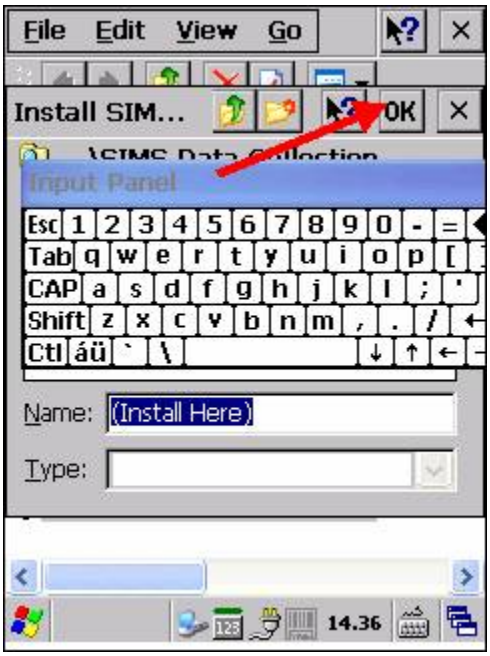
Use the stylus that came with your scanner and double tap the **My Device** icon on the desktop of your scanner:



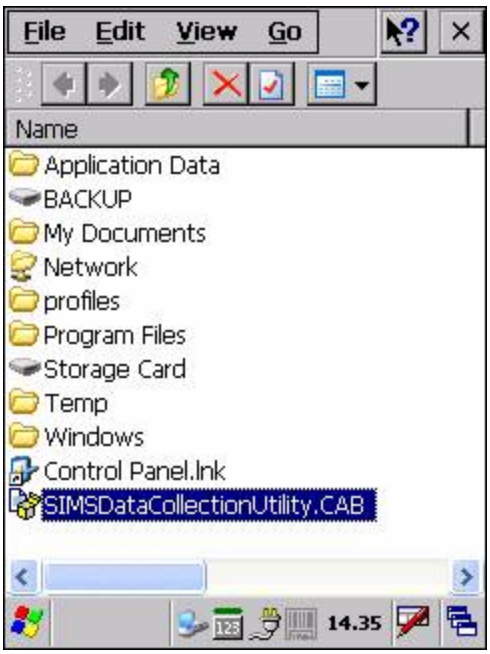
You will see the file you copied in the previous step. Double tap on this file to begin installation.



Click the **OK** button when the following dialog appears:

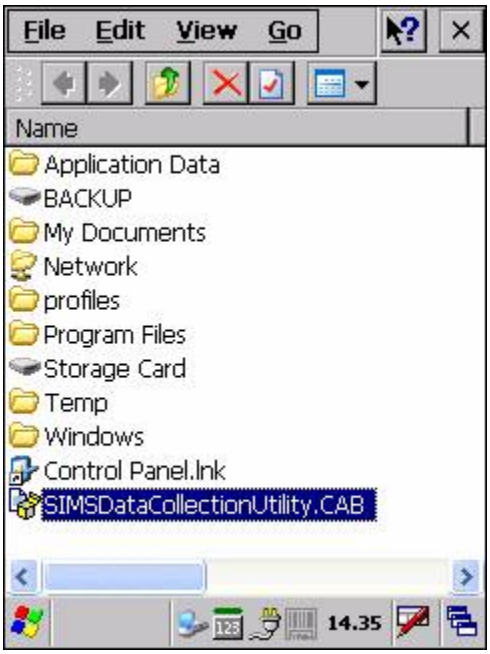


After installation the CAB file will disappear from the Windows Explorer window. Close this window and you will return to the scanner main screen. There will be a new **SIMS Data Collection** icon on the desktop.



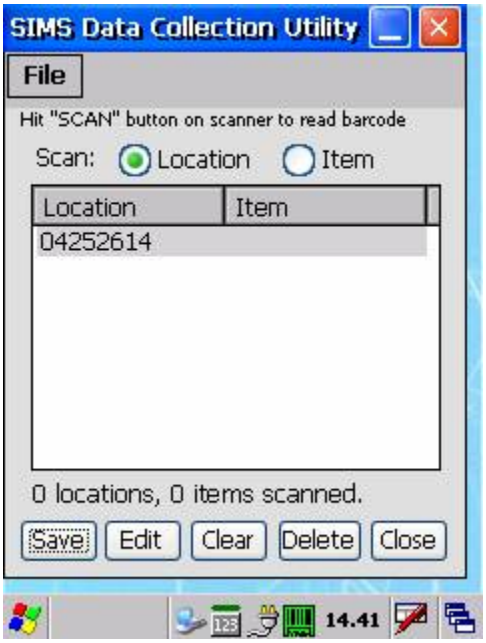
Performing a Barcode Inventory

Double tab the Datalogic memor's **SIMS Data Collection** icon.

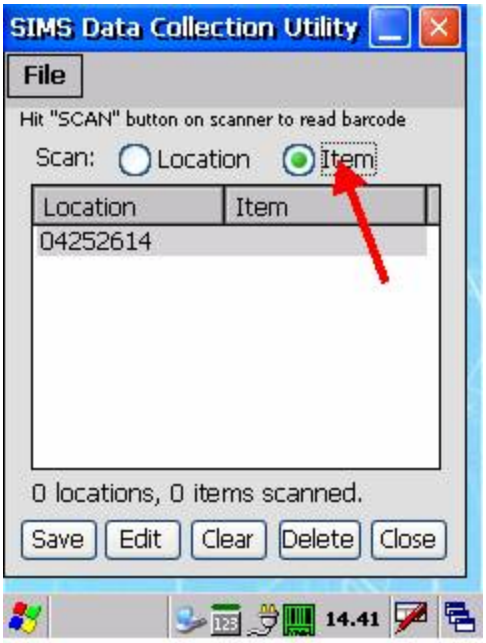




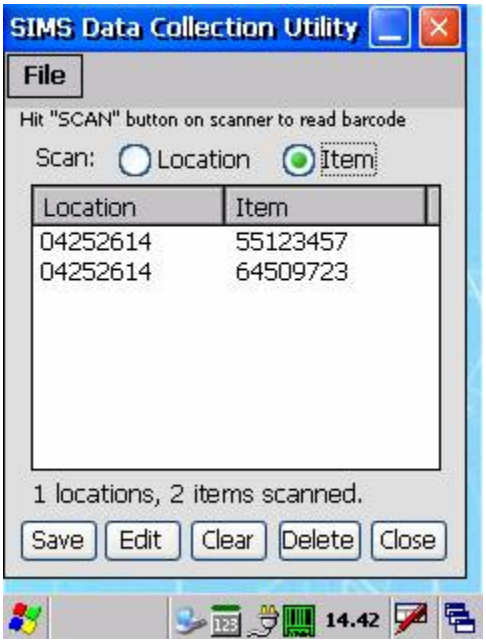
Select the "Location" radio button and scan a location item (Container or Personnel) barcode.



Select the **Item** radio button.

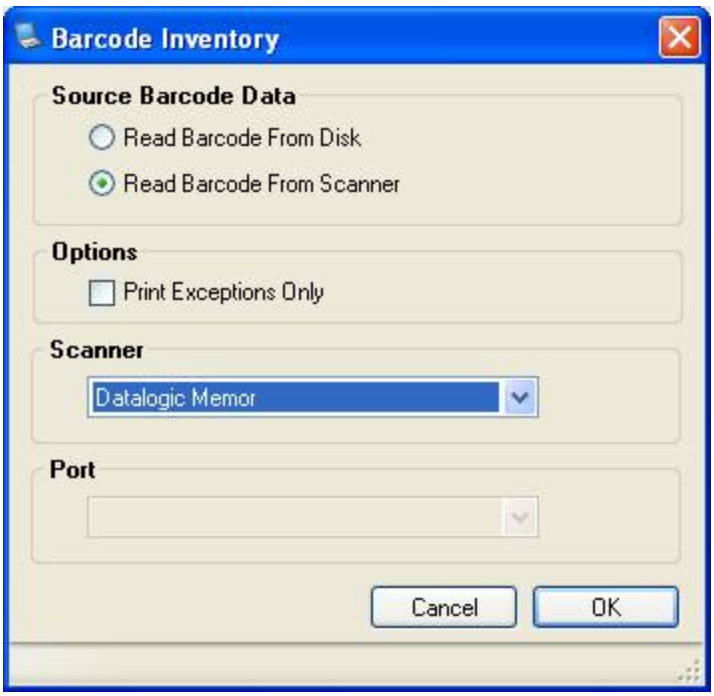


Scan one or more Document barcode labels that are associated with the previously scanned Container or Personnel barcode. Continue this scanning process until all Document barcodes for the Container/Personnel have been scanned.



With this utility you are able to Add, Edit, and Delete scanner barcodes. You can save scanned barcode data to a file in the folder **\Program Files\SIMS Data Collection Utility\Barcodes**. The file name field will automatically default to the current date and time. However, you may also specify a filename using the keyboard screen graphic. Once you have saved a file with barcodes you may close the utility and use the SIMS Client on your PC to import and process the data.

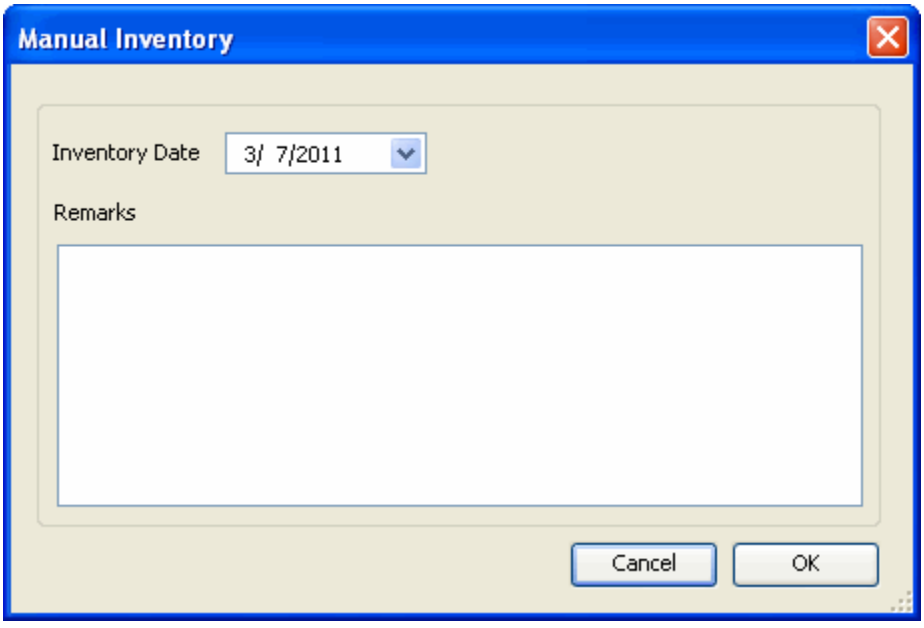
Select **Documents -> Transactions -> Barcode Inventory** from the SIMS menu. Select the radio button option **Read Barcode From Scanner**, and select the ComboBox item **Datalogic Memor**. Click **OK**.



A file explorer window will appear.

Highlight the TXT file containing the barcode data you want processed and click **OK**. The data will be downloaded, processed, and SIMS will display a report. When you close the report, SIMS will ask if you would like to save the file to your PC. This step is optional.

Manual Barcode Inventory



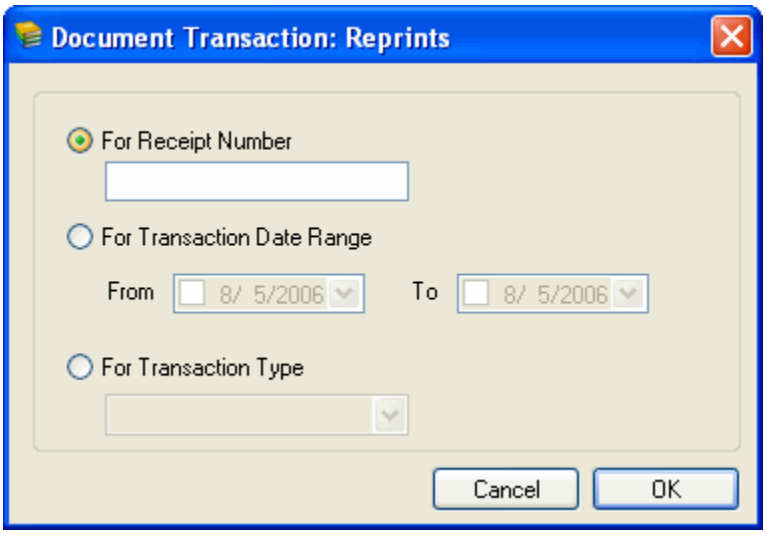
Manual Barcode Inventory

Inventory Date
Enter the date that the document(s) are being inventoried.
Remarks

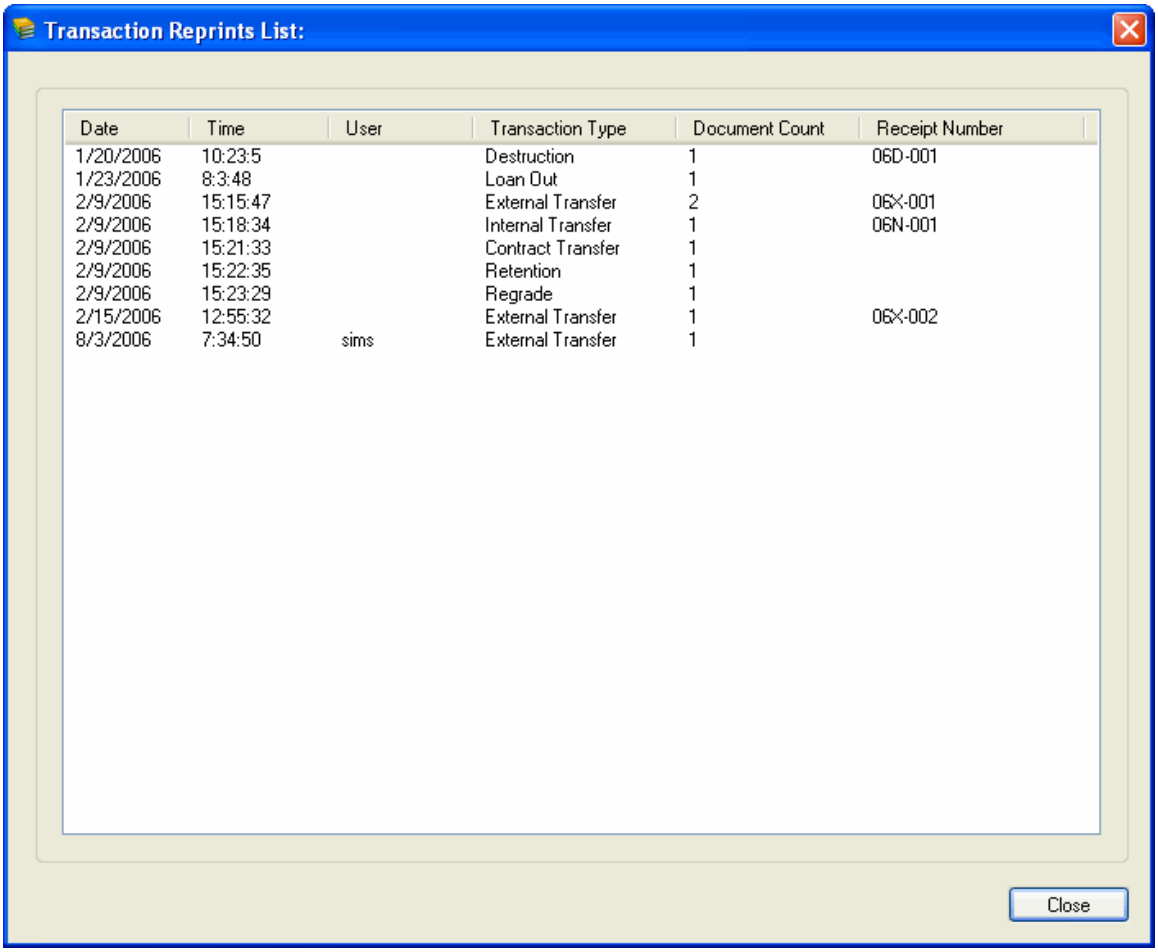
Enter any remarks to appear on the report.
Print Document Special Accesses
If selected, the document's special accesses will appear on the certificate.
Click **OK** when all of the requirements have been fulfilled.

Transaction Reprints

All Document transactions have receipts and all receipts can be printed in an identical form to the original. To get a reprint, go to the **Transactions** menu in Documents and select **Transaction Reprints**.



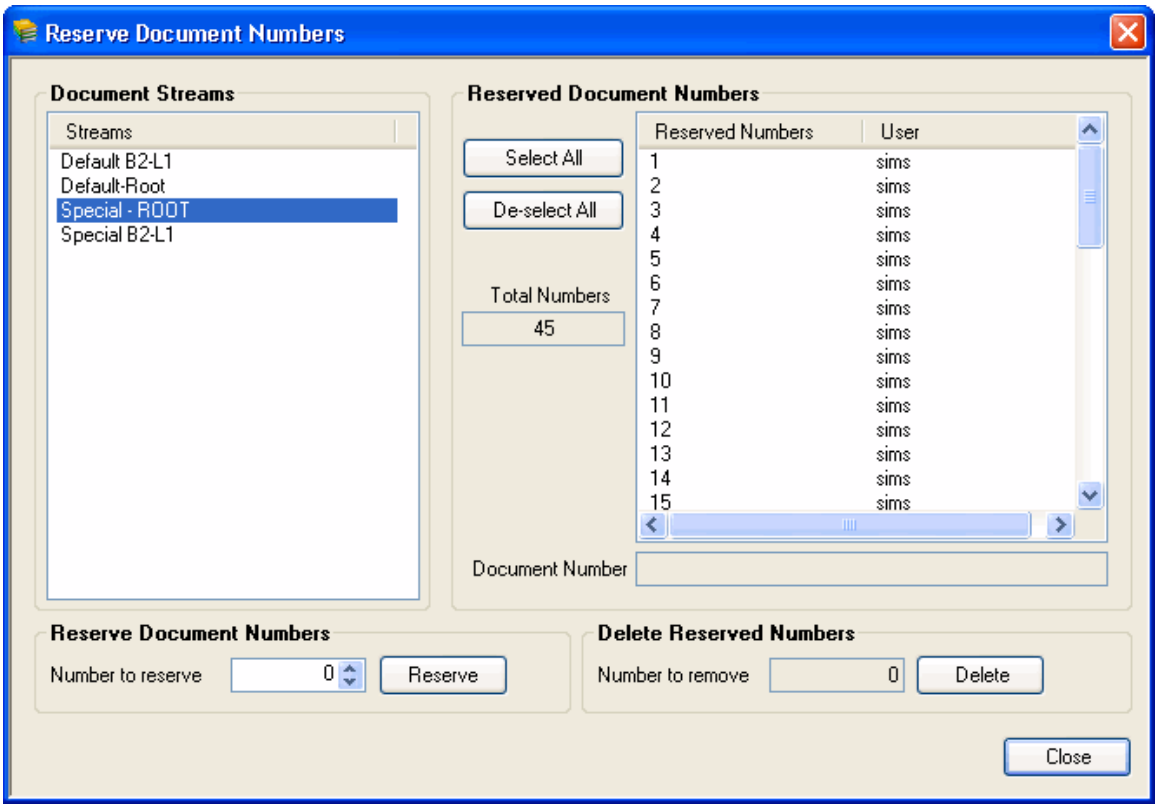
Enter information either a receipt number, a transaction date range, or a transaction type, and then choose OK. A report will display.



Reserve Document Numbers

The Reserved Document Numbers capability allows us to reserve any number of document numbers from any stream at any time.
Go to **Transactions** and select **Reserved Document Numbers**.

The screen shown below will appear.

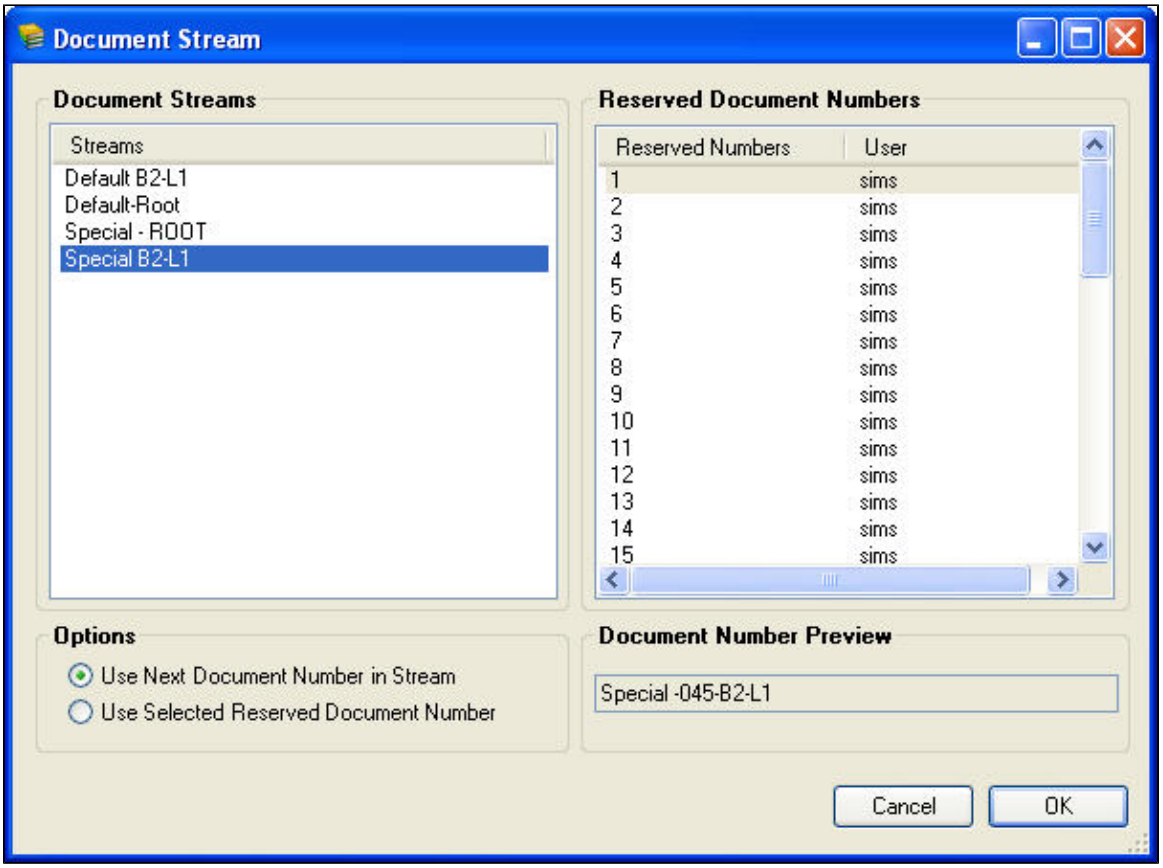


Select the document stream from which the document numbers will be reserved.
Enter a count in the number to reserve box.
Click on the Reserve button.
A listing of reserved numbers will appear in the Reserved Document Numbers list.
Remember: these are not document records and they will not show up on the document list.
These are nothing more than reservations for document numbers.
To delete a reserved number, select the number in the list and choose Delete.

Convert a Reserve Number to a Document Number
To convert a Reserve Number to a Document Number, choose the Stream button on the home page of a new document record. The screen shown below will appear.

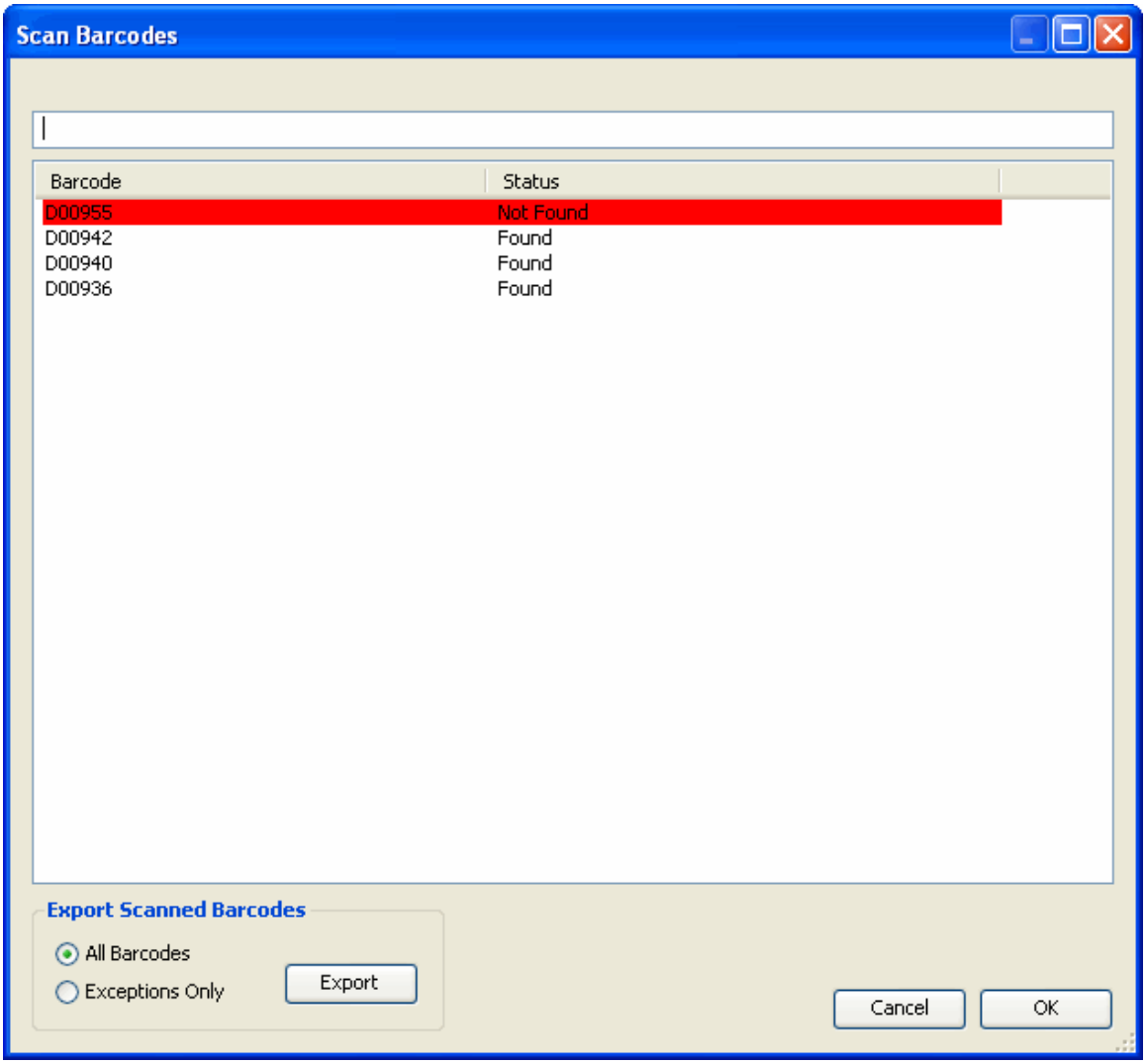
Select a stream in the list and all of the reserved numbers for that stream will appear on the right.
Choose the option: Use Selected Reserved Document Number

Select the reserved number and then choose the OK button.



Scan Barcodes

When you select the Scan Barcodes button, you will be presented with a dialog. Here you can manually type in each barcode or quickly scan in a bulk of barcodes at one time. The status will indicate if it is searching, found, or not found.

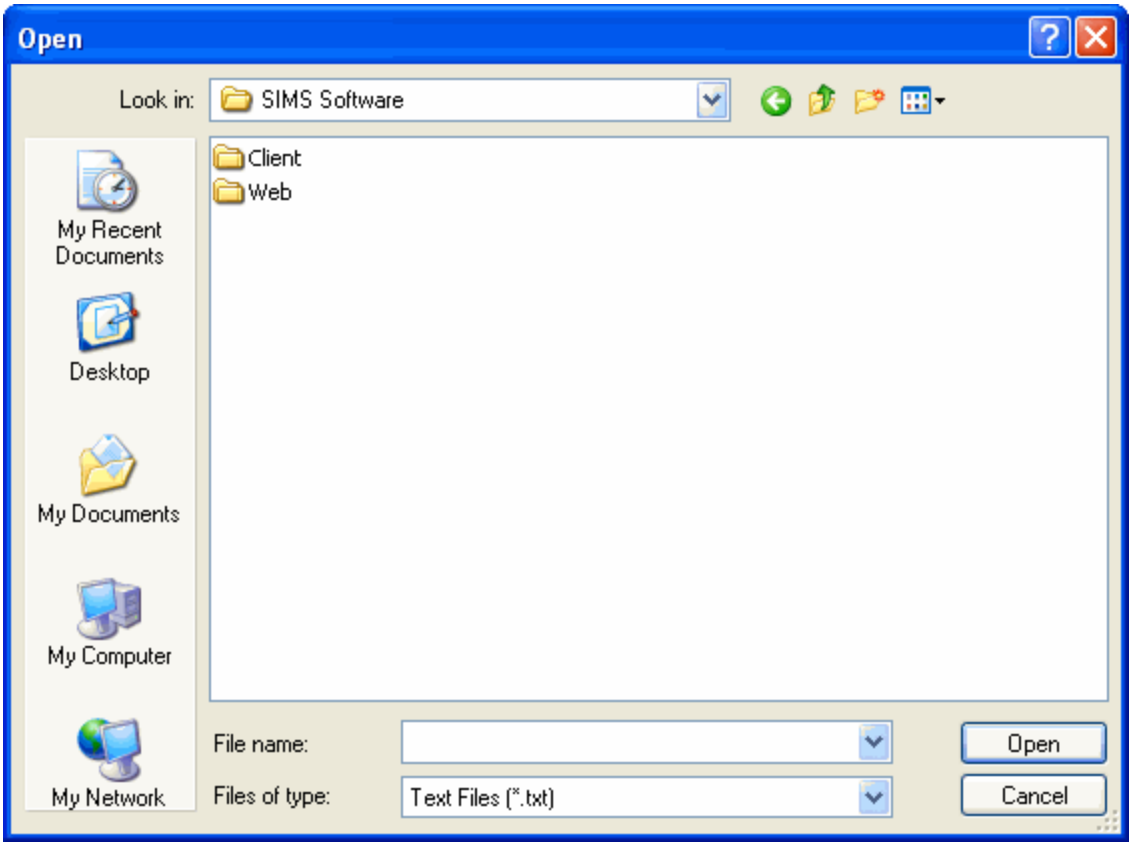


Scan Barcodes

All Barcodes
To export all barcodes that were scanned, including those that were found and not found, choose this option and then the Export button. A dialog will allow you to save the export as a .csv file.
Exceptions only
To export all barcodes that were scanned and have a status that is "Not Found", choose this option and then the Export button. A dialog will allow you to save the export as a .csv file.

Classified Documents Load/Make ScanSet

Load ScanSet
When you pick Load Scan Set you will be presented with the standard Open File dialog box. You should next open a scanfile that has been created by a TopGun, or other barcode scanner that is compatible with the SIMS barcode inventory process. SIMS will then find all the documents whose barcodes were recorded in the scanfile and those will be displayed on the output screen.



Make ScanSet

In the Document output screen, highlight or query the records in which to make a scanfile. Select Load Scanset/Make Scanset from the Transactions menu. The Document Transactions screen will appear. Choose the Make Scanset button, and then enter a file name in the Save As dialog. The scanfile will contain all the barcodes for the selected document records.

Use a Barcode Inventory as a Scanset

Step 1: Open a Barcode Inventory in Excel

1) Open Excel.
2) Open a Barcode inventory Text file in Excel.
3) It may be necessary to change the type of file you are looking for at this point in order to find the text file. Select the option All Files.
4) Once the barcode inventory has been located and opened, a wizard will appear to guide you through the process of converting the file to Excel.
5) When the wizard appears, click Next on the first page.
6) Once the second page appears, make sure that both Tab and Comma delimiters have been selected.
7) Click Next.
8) Click Finish.
9) You should now see two columns in Excel. The first column is for container barcodes and the second is for document barcodes.

Step 2: Eliminating the Container Barcodes

1) SIMS cannot read a scanset properly if it contains container barcodes. You will need to remove that column.
2) Click on column A's header to select the entire column and then right-click on the column and select Delete.
3) Next, click OK when asked if you wish to move all other columns to the left.

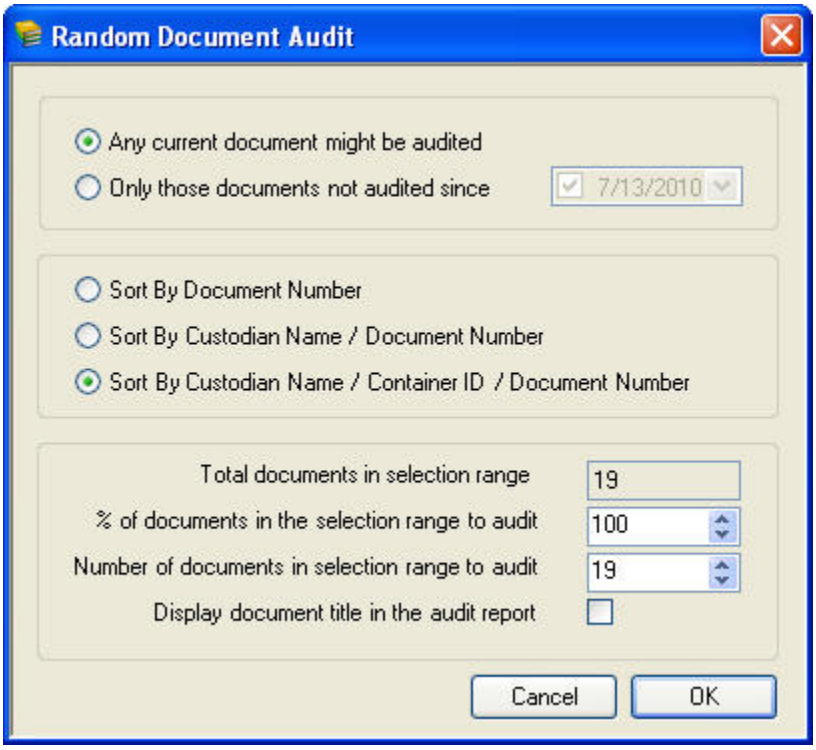
4) Now you need to save the file as a text file again so click File and Save As and choose Text file from the Files of Type drop down menu.
5) Give the file a name that you will easily recognize (you may want to include the date) and save it somewhere you will easily be able to find it.
6) Close either Excel entirely or at least this file within Excel. The next step will fail if you do not do this.

Step 3: Loading the Scanset You Have Just Created.

1) Open SIMS and then open the Documents module. Click on the menu for transactions and choose Load scanset/Make scanset.
2) The transactions screen will appear. On the right side of the screen click the button for Load Scanset and then choose the scanset you just created.
3) Click Open.
4) The scanned set of documents will appear in the list of selected documents at the top of the screen.

Classified Documents Random Audit

This special utility allows a user to create a randomly selected listing of documents for partial auditing purposes, which can be sorted either by Document Number or by Custodian, Container, and Document Number.


Random Document Audit
Any current document might be audited
Only those documents not audited since
7/13/2010
Sort By Document Number
Sort By Custodian Name / Document Number
Sort By Custodian Name / Container ID / Document Number
Total documents in selection range
19
% of documents in the selection range to audit
100
Number of documents in selection range to audit
19
Display document title in the audit report
Cancel
OK

If you check **Any current Document might be audited**, all documents with a status of "In House" will form the selection range. If you do not check this field, then the selection will be based on those documents that have not had a random audit since the entered date. You can determine either a percentage of the documents in the range to be randomly selected out or a fixed number of documents to select out from the range. Lastly, there is an option to print document titles on the audit report.
Click **OK** to begin the selection process, which is followed by a print action.

DoD Outgoing Requests

Purpose of DoD Outgoing Requests

DoD Outgoing Requests maintains and prints DoD visit requests sent to other facilities.

The DoD Outgoing Requests module prepares and prints all DoD visit requests to be sent out to other facilities. If a DoD visit request needs to be terminated, a letter of visit termination can also be printed. Items such as name and address of the facility visited, point of contact, phone, dates of visit, and the names and social security numbers of the visitors are stored in this module.

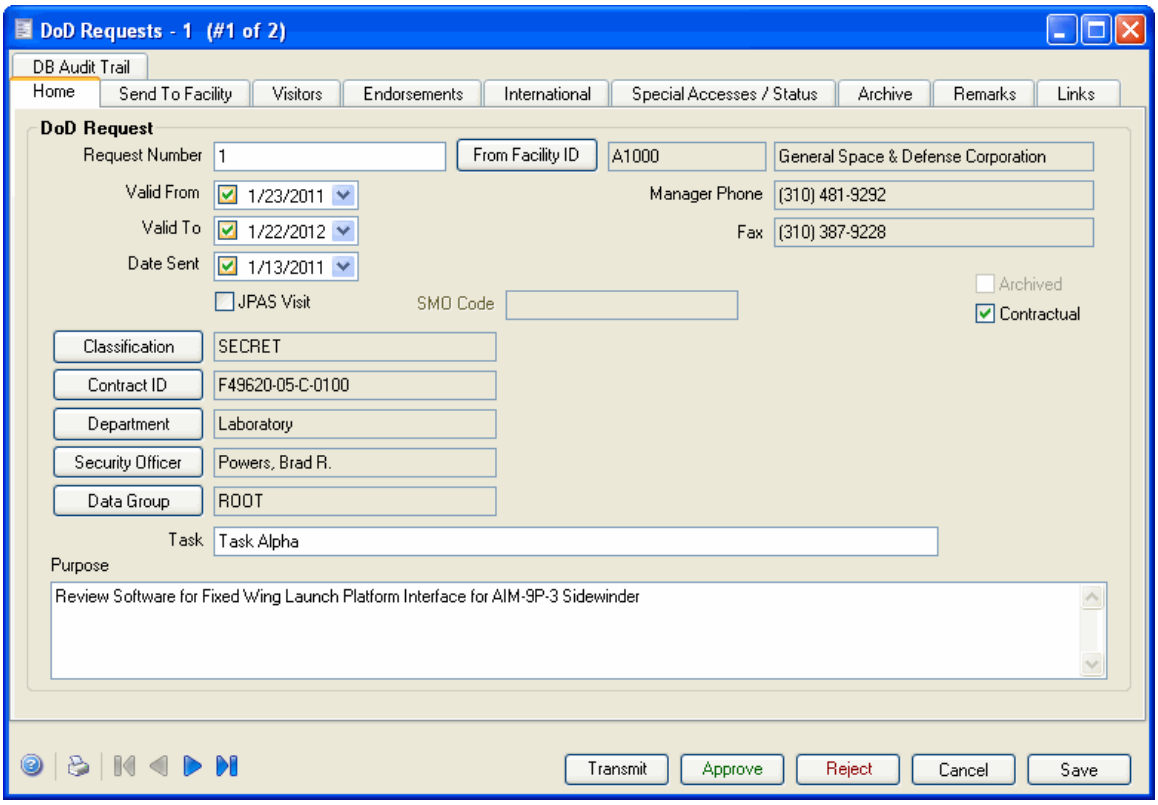
Input Screen Description
Home
Send to Facility
Visitors
Endorsements
International
Special Accesses and Status
Remarks
Links

List Screen Description
Default Output List

Reports
Reports

DoD Outgoing Requests Input

DoD Outgoing Requests Home



The Naval Message checkbox is not displayed by default on the home input screen. The checkbox will display if the Enable Naval Messaging checkbox in the DoD tab of System Customization is checked.

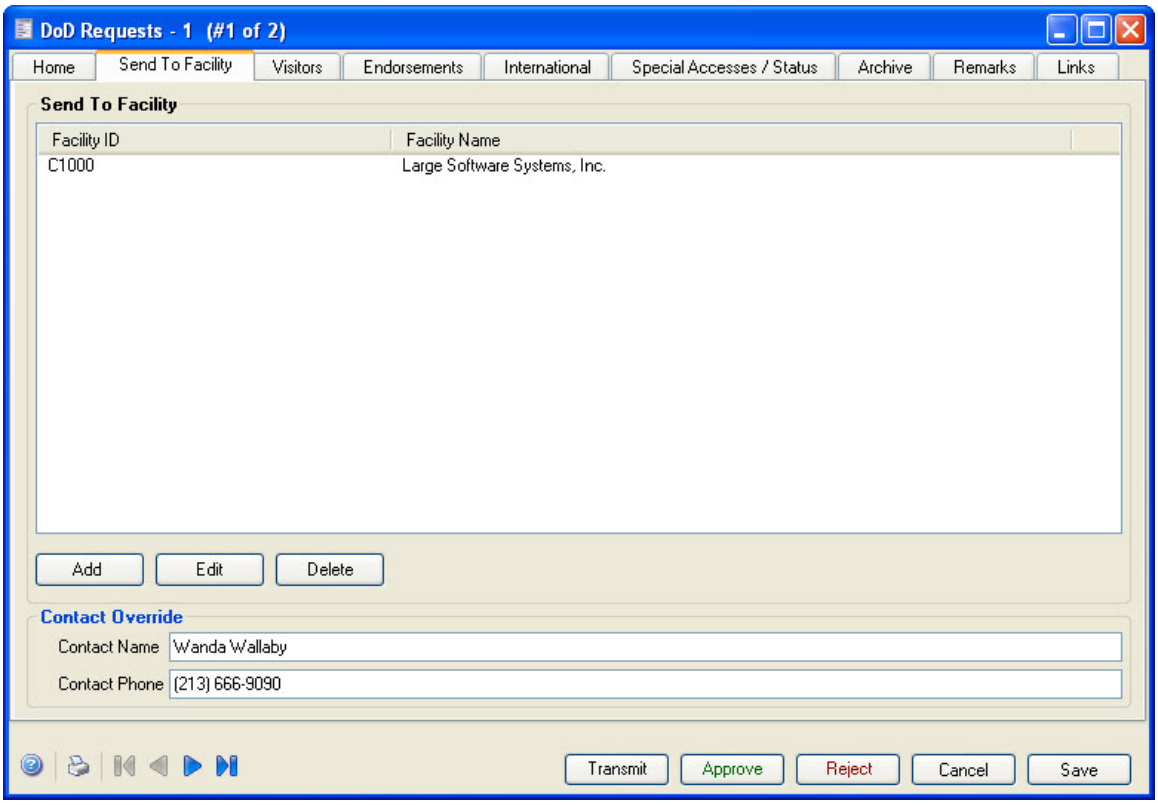
For more information about using this screen, see Input Screen.

DoD Outgoing Visit Requests, Home Page Fields

Field Name	Description
Request Number	This number can be assigned automatically, using the format defined in Utilities -> Auto Numbering.
Department	Enables you to group or query visit requests by department.
Task	The task ID associated with the contract.
Anticipated Classification of Topic	The highest level of classification that will be required for the visit.
Valid From	The visit request start date.
Valid To	The visit request end date.
Date Sent	The date that the visit request was sent.

JPAS Visit	When JPAS visit selected, the facility list on the Send to Facilities tab will be disabled. A message will display in the "Send To Facility" tab, indicating the facility information is not required for JPAS visits.
SMO Code	When the JPAS visit is selected, the SMO code field that can be used in lieu of facility information for processing a visit.
Archived	Indicates whether the visit request has been archived.
Contractual	Check this box if the request is contract related.
From Facility ID	To select a host facility, click **From Facility ID**.
Manager Phone	Fills in automatically when Facility ID is selected.
Fax	Fills in automatically when Facility ID is selected.
Security Officer	To select a Security Officer, click **Security Officer**.
Contract ID	The contract ID governing the visit.
Contact Name	The point of contact at the facility to be visited.
Contact Phone	The point of contact's telephone number.
Data Group	The data group that the request belongs to. Data groups are defined in the User Management Data Groups dialog.
Purpose	A brief description of the reason for the visit. This information is printed on the visit request report under the heading "Purpose of Visit."

DoD Outgoing Requests Send to Facility

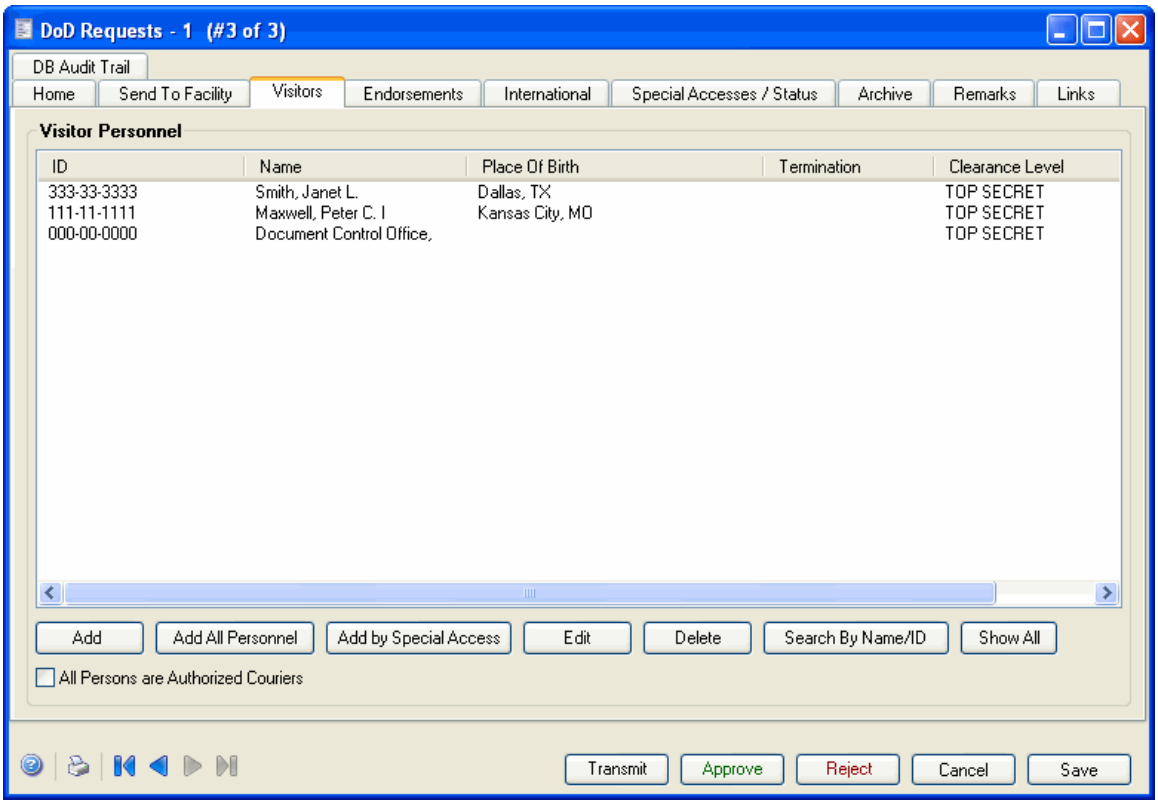


For more information about using this screen, see Input Screen.

DoD Outgoing Requests, Send To Facility Page Fields

Field Name	Description
Facility ID	The facility ID.
Facility Name	The facility name.
Contact Name	The contact name specified in this field will override the contact name that appears in the Send To Facility record.
Contact Phone	The contact phone specified in this field will override the contact phone that appears in the Send To Facility record.

DoD Outgoing Requests Visitors

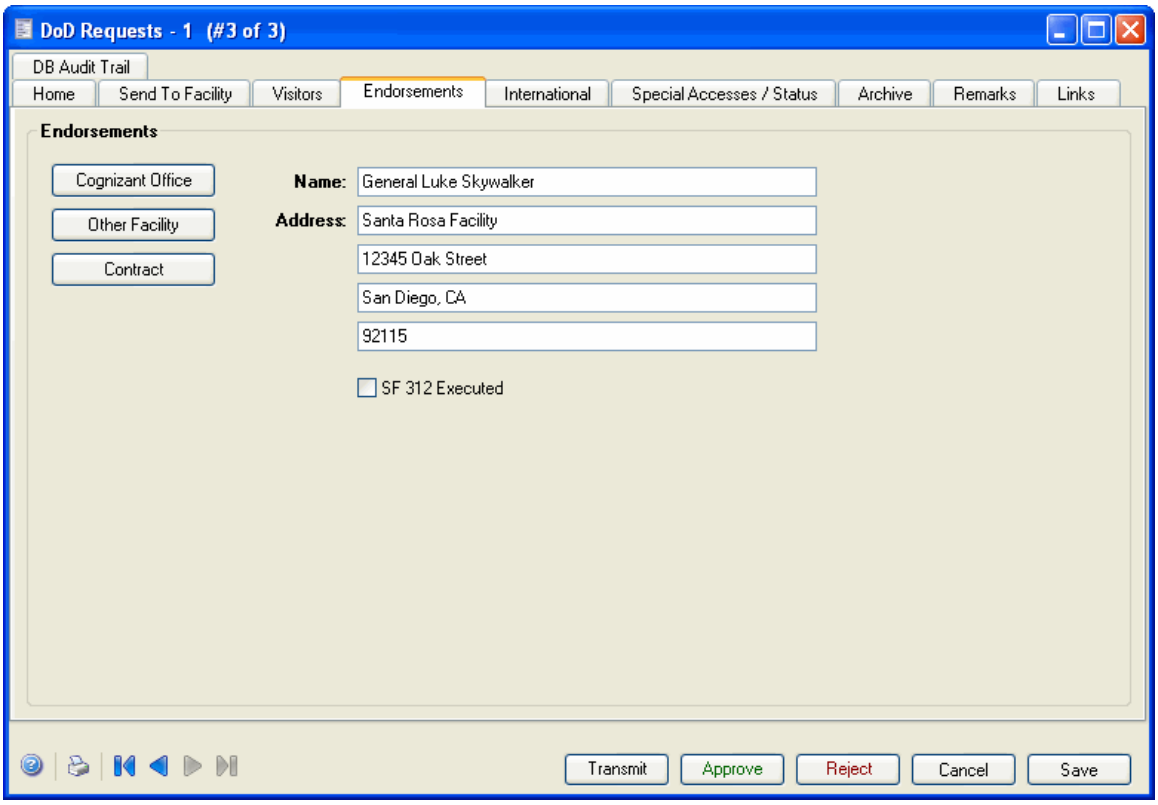


For more information about using this screen, see Input Screen.

DoD Outgoing Requests, Visitor Personnel Page Fields

Field Name	Description
Search by Name/ID	Click this button to find people that have already been added to the request, by name or by ID.
All Persons are Authorized Couriers?	Check this box if all of the visitors are designated as authorized couriers of classified material. Click **Edit** to designate individual visitors as couriers.

DoD Outgoing Requests Endorsements

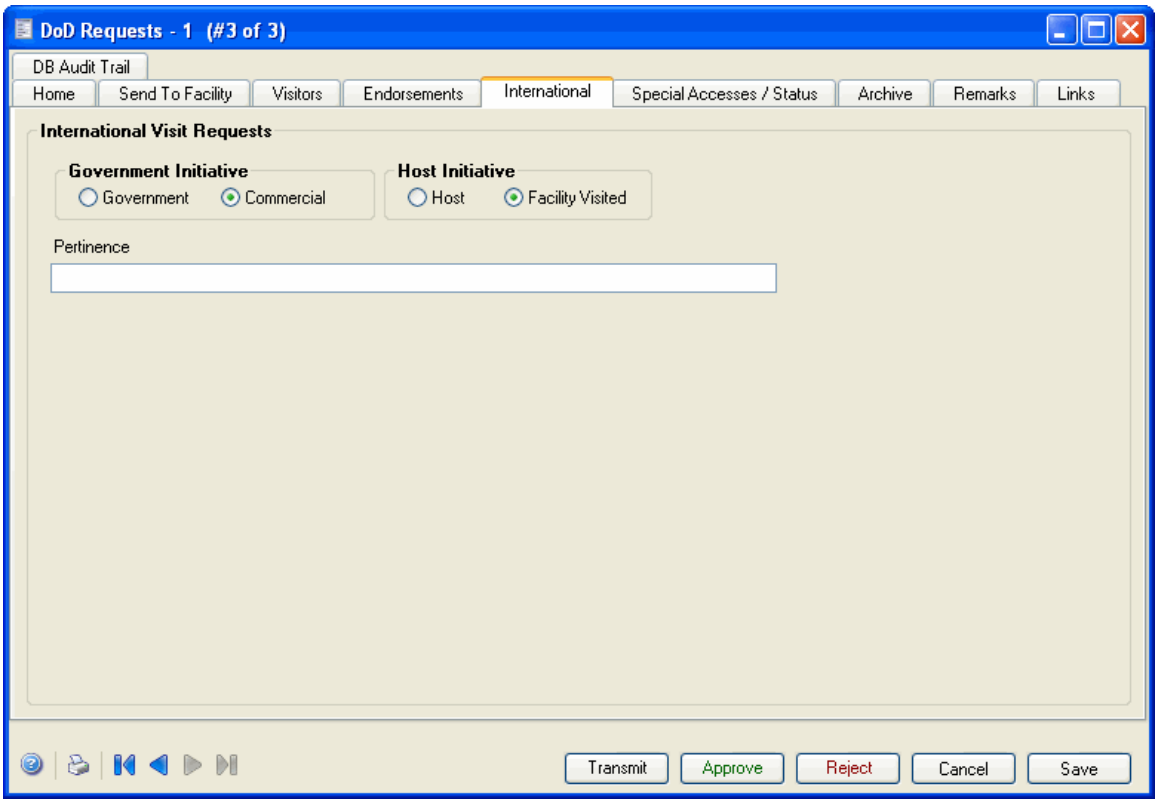


For more information about using this screen, see Input screen.

DoD Outgoing Requests, Endorsements Page Fields

Field Name	Description
Cognizant Office	If a cognizant office is endorsing the visit, click to select the office.
Other Facility	If an other facility is endorsing the visit, click to select the facility.
Contract	If a contract is endorsing the visit, click to select the contract.
Name	Information is obtained, depending on what is selected using the Cognizant Office, Other Facility, or Contract button.
Address	Information is obtained, depending on what is selected using the Cognizant Office, Other Facility, or Contract button.
SF 312 Executed	Check this check box if all visitors have signed the SF 312 classified information non-disclosure agreement form.

DoD Outgoing Requests International

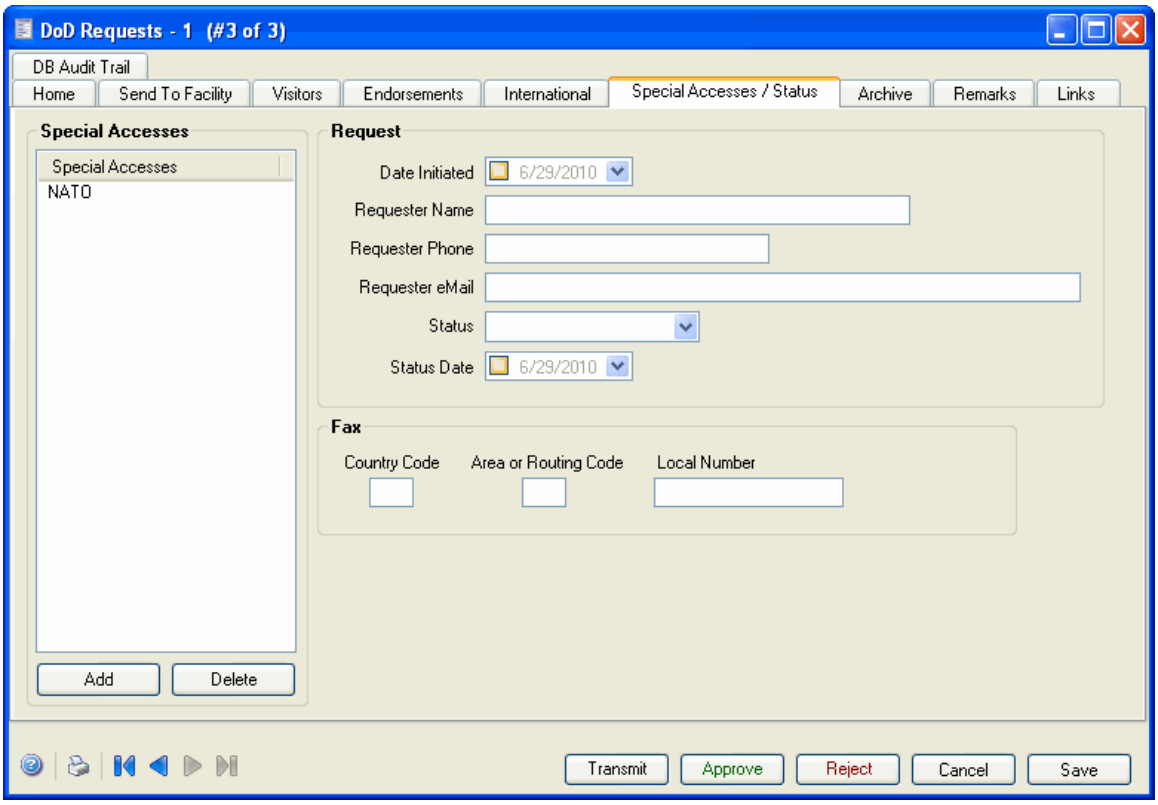


For more information about using this screen, see Input Screen.

DoD Outgoing Requests, International Page Fields

Field Name	Description
Government Initiative	Indicates whether the initiative is government-related or commercial.
Host Initiative	Indicates whether the initiative was initiated by the host facility or the facility being visited.
Anticipated Classification of Topic	The most likely classification level required for the visit. If multiple classification levels may be required, select the highest level.
Pertinence	A brief description of the topic of the visit and any local projects that it may affect.

DoD Outgoing Requests Special Accesses/Status



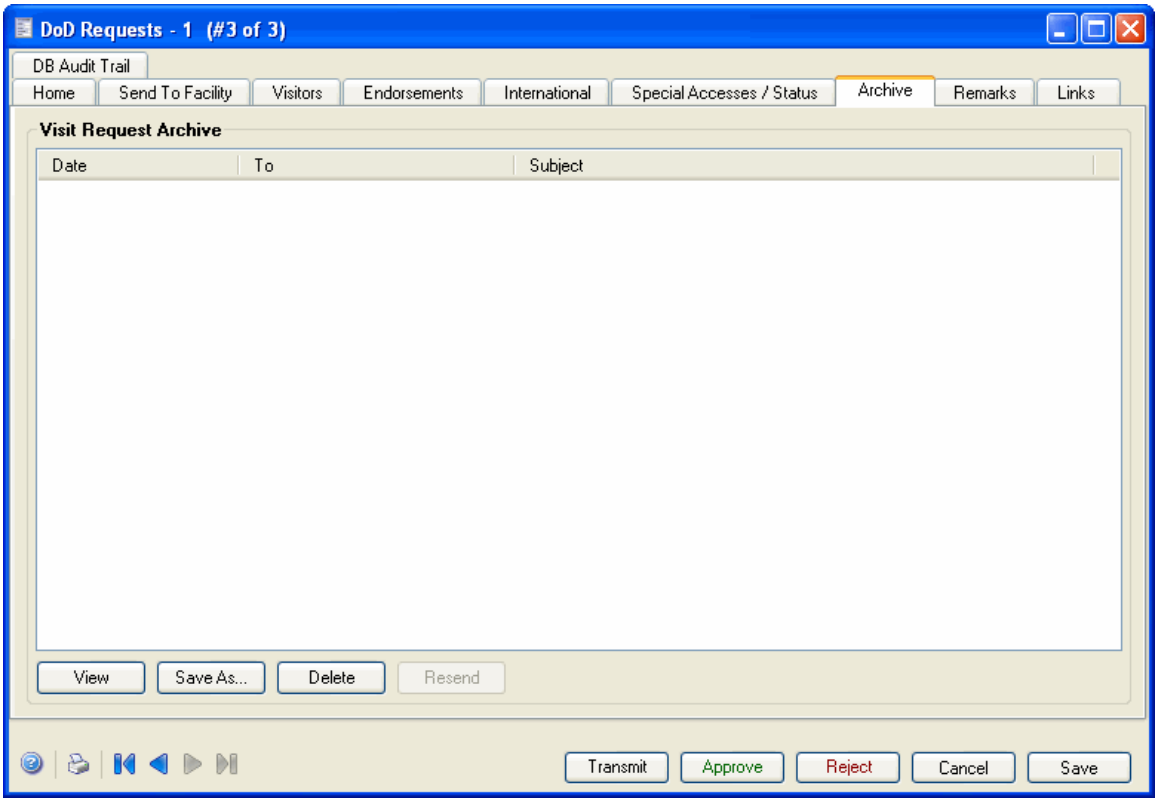
For more information about using this screen, see Input Screen.

DoD Outgoing Requests, Special Access and Status Page Fields

Field Name	Description
Special Accesses	Any special accesses required by each person on the visit request.
Date Initiated	The date the visit request was created.
Requester Name	The requester's name, if the record was created via the web interface.
Requester Phone	The requester's phone number, if the record was created via the web interface.
Requester eMail	The requester's email, if the record was created via the web interface.
Status	The current status of the visit request.
Status Date	The date when the status last changed.
Fax	The fax number where the DoD Outgoing Request is going to be faxed, starting with country code and area/routing code. If the fax number is inside the U.S., leave the country code blank.

DoD Requests Archive

A PDF file containing a copy of the DoD Request record that was previously E-mailed or Faxed (but not printed) is created and saved for archival purposes on this tab. Also, when printing a DoD Termination and Regrade Letter, a copy of the report is saved so that if it needs to be retrieved or reprinted it can be done so in this tab.

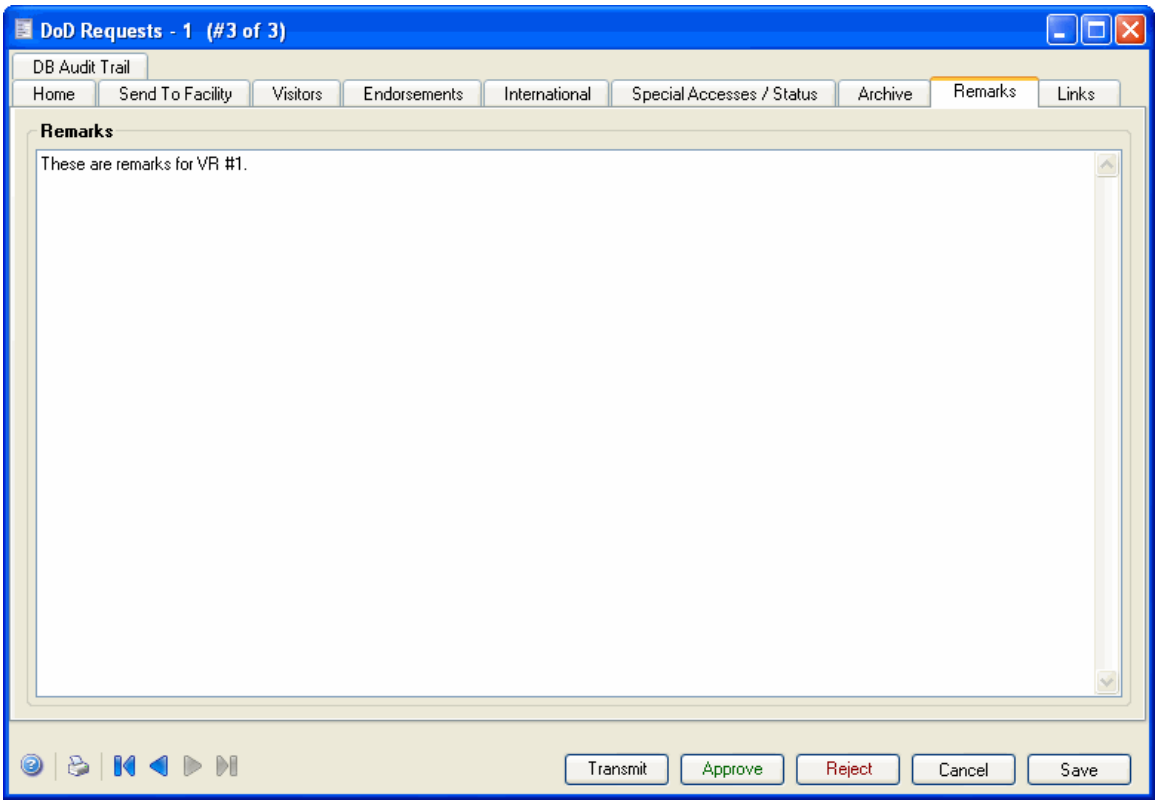


For more information about using this screen, see Input Screen.

DoD Outgoing Requests, Archive Page Fields

Field Name	Description
Date	The date that the record was E-mailed or Faxed.
To	The To field for the E-mail or Fax.
Subject	The Subject field for the E-mail or Fax.

DoD Outgoing Requests Remarks

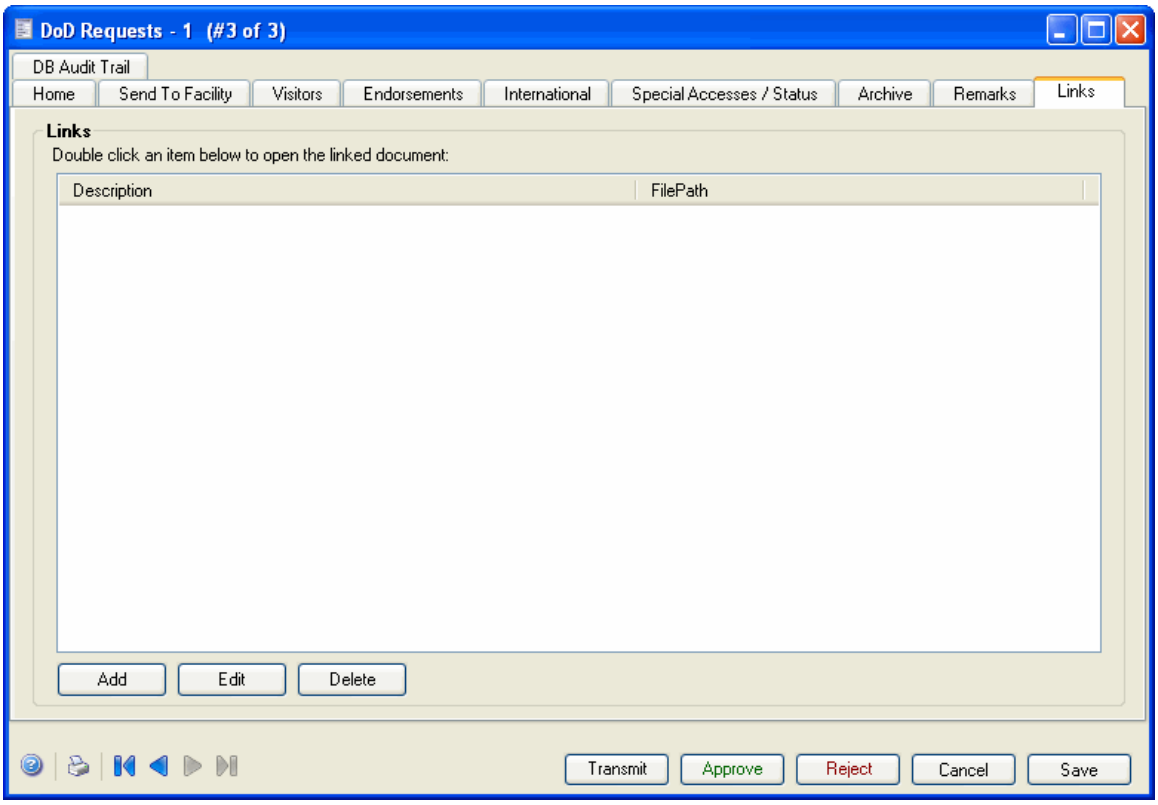


For more information about using this screen, see Input Screen.

DoD Outgoing Requests, Remarks Page Fields

Field Name	Description
Remarks	Enter comments or other information regarding this visit.

DoD Outgoing Requests Links



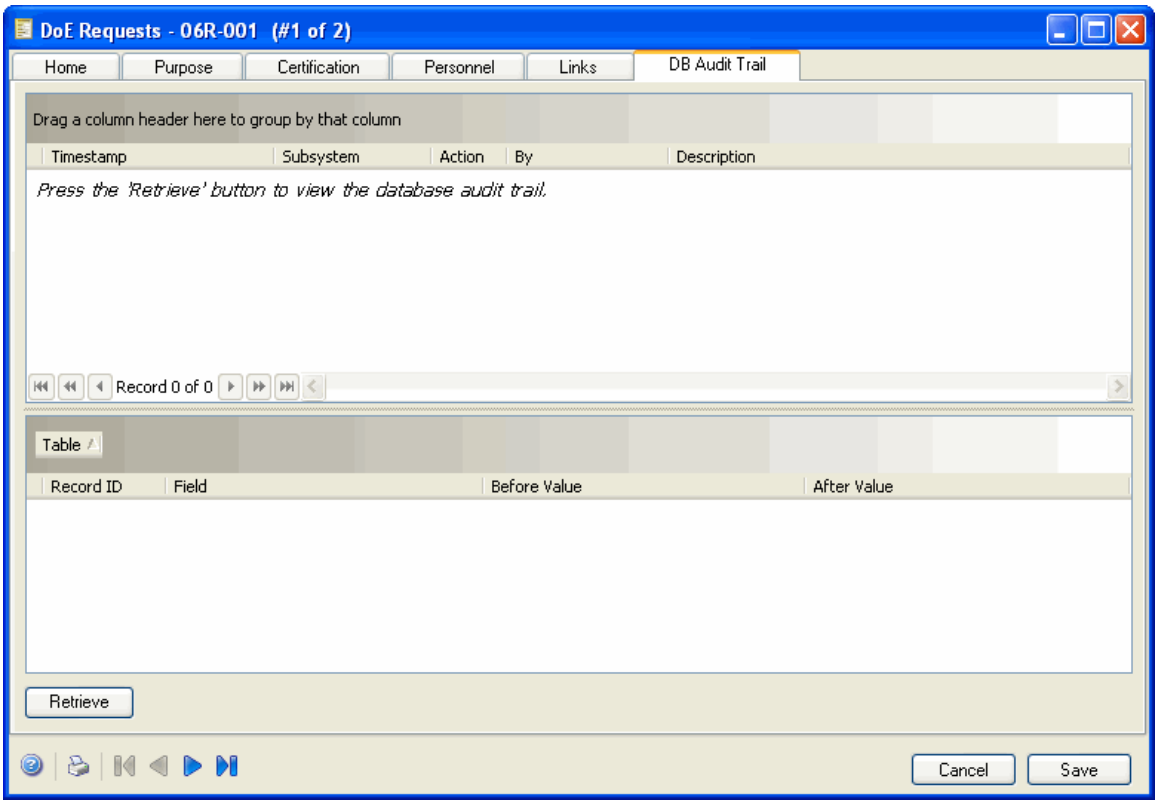
For more information about using this screen, see Input Screen.

DoD Outgoing Requests, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

DoD DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

DoD Outgoing Requests, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

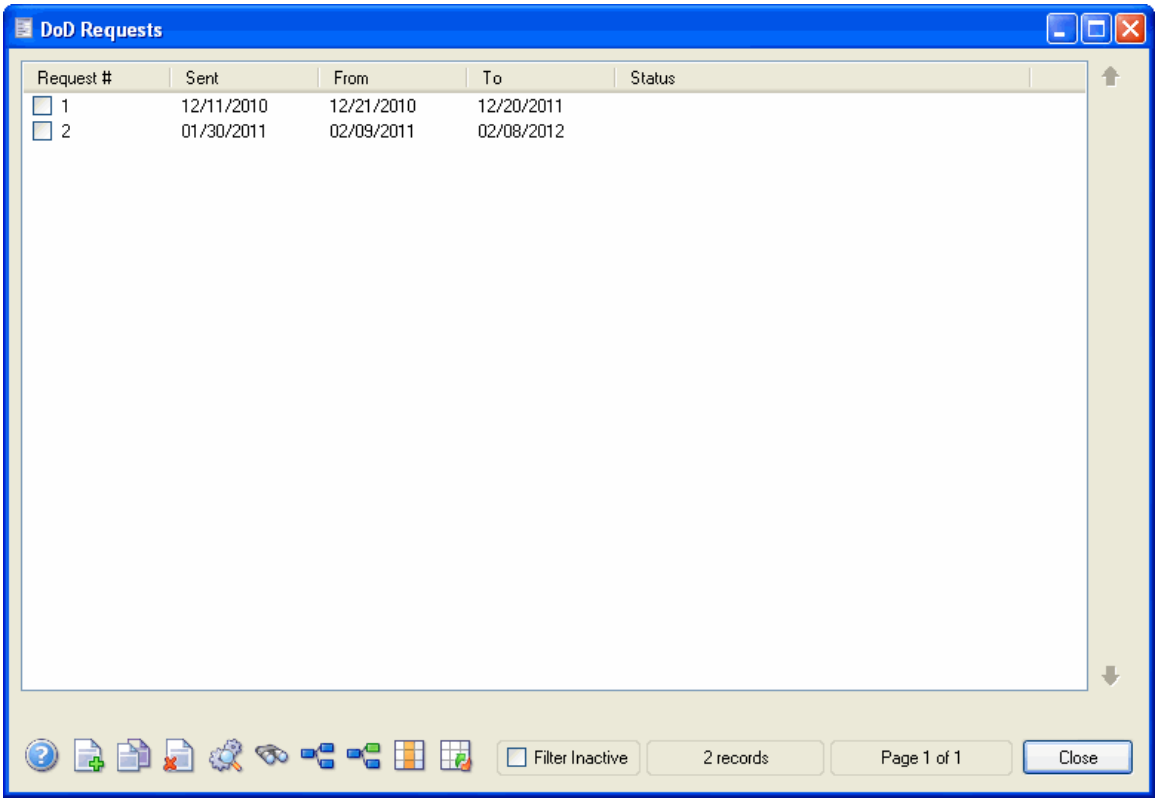
DoD Outgoing Requests List

Default Output List Screen

The DoD Requests default output list screen shows the Request #, Date Sent, From and To Dates, and Status Date fields for each request record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** checkbox to show archived visit requests on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

DoD Outgoing Requests Reports

DoD Outgoing Requests Reports

Reports Menu
For more information about the default reports that appear in every module, see:

- Standard Reports

The rest of this page describes module-specific reports.

Print a Visit Request
To print a visit request, select the DoD Outgoing Request record from the Output List by highlighting it and then select the Detail Report from the Reports menu. The Visit Request can also be printed by clicking on the printer icon in the Input Screen of a DoD Outgoing Request record.

As with any SIMS built-in report, the visit request report can be customized. Often times, there may be a need to display a company logo on a visit request report. There are a few ways to add a logo to the report. Please refer to the help documentation for Custom Reports which provides an example of how to modify a visit request report. The section on Custom Images also provides an alternate method of adding a logo to a report.

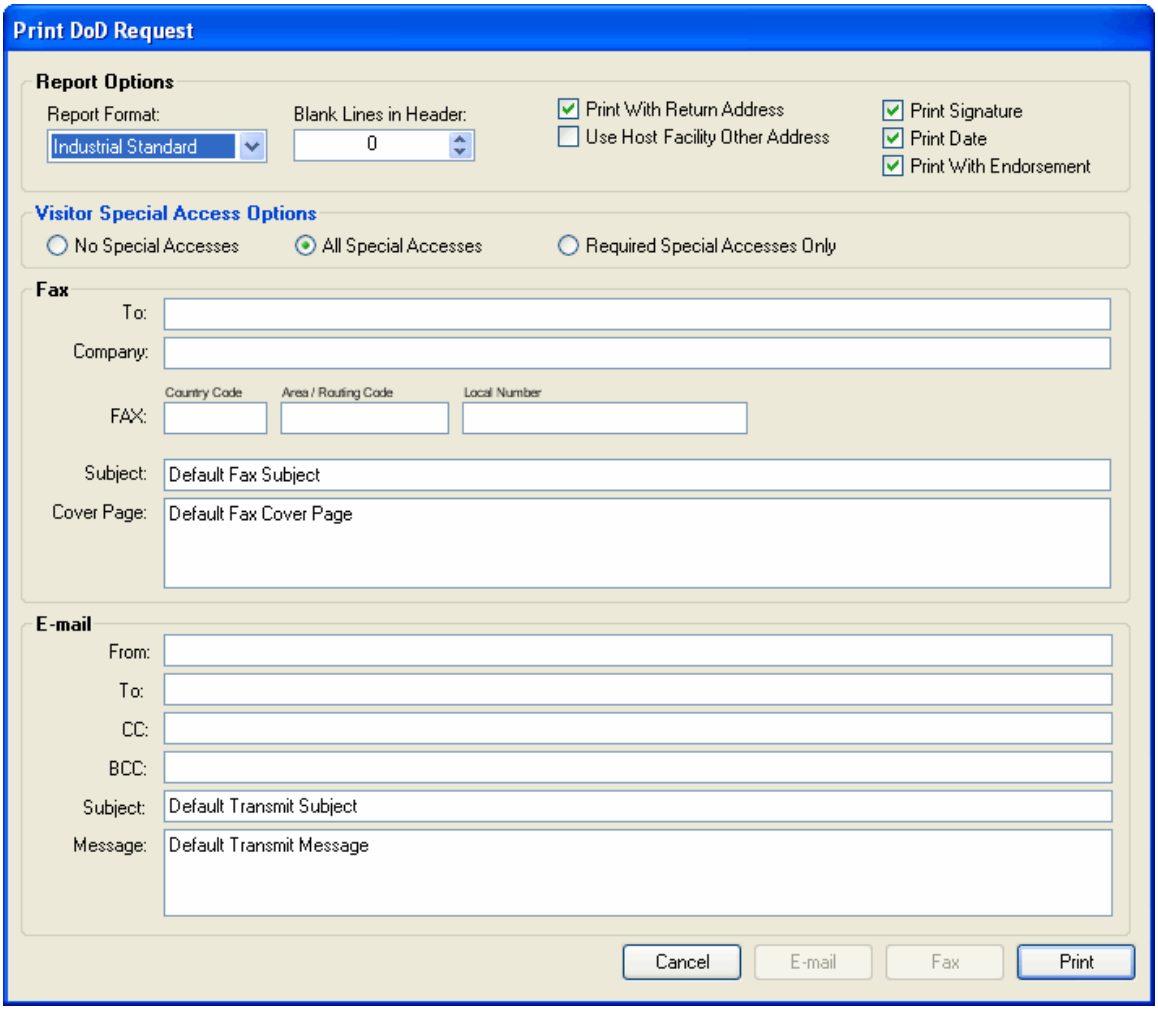
Requests About to Expire
This report prints a list of all visit requests that will expire within a user-specified date range.

Termination & Regrade Letters
This report prints a visit termination or clearance regrade letter for selected visit requests and selected visitors. A PDF copy of the report is saved in the visit request's Archive tab so that it can be retrieved or reprinted.

Print a Visit Request

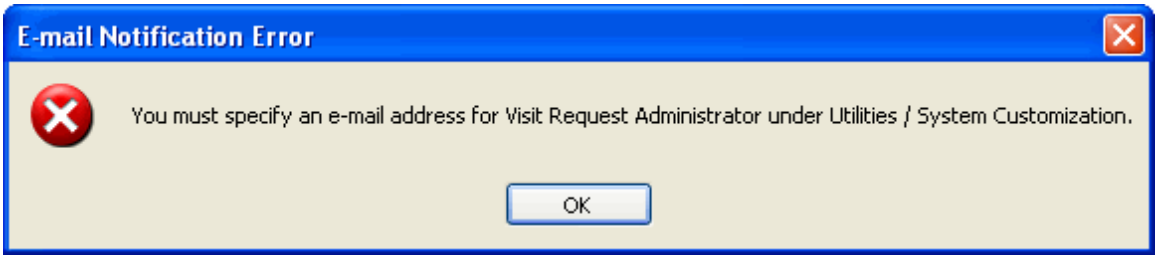
To print a visit request for a record, edit the record by double-clicking it in the output screen and then clicking on the Print button. Check the options if you wish the feature to appear on the report. Select the radio button options to choose whether no special accesses, all special accesses, or only required special accesses required by the visit.

Select the Report Format. Each format will print a slightly different visit request layout.



E-mail a Visit Request

To E-mail a visit request for a record, edit the record by double-clicking it in the output screen and then clicking on the Approve or Reject button.
If you haven't setup your E-mail SMTP server and information for the Visit Request Administrator in the System tab and the OVR Notifications tab of System Customization, you will see the following:


E-mail Notification Error
You must specify an e-mail address for Visit Request Administrator under Utilities / System Customization.
OK

SIMS needs to know what your SMTP (Host) mail server address and the Visit Request Administrator is so it can send email.

DoE Outgoing Requests

Purpose of DoE Outgoing Requests

DoE Outgoing Requests maintains and prints visit requests sent to other facilities.

The DoE Outgoing Requests module prepares and prints all visit requests to be sent out to other facilities. If a visit request needs to be terminated, a letter of visit termination can also be printed. Items such as name and address of the facility visited, contact, phone, dates of visit, along with the names and social security numbers of the visitors are stored in this module.

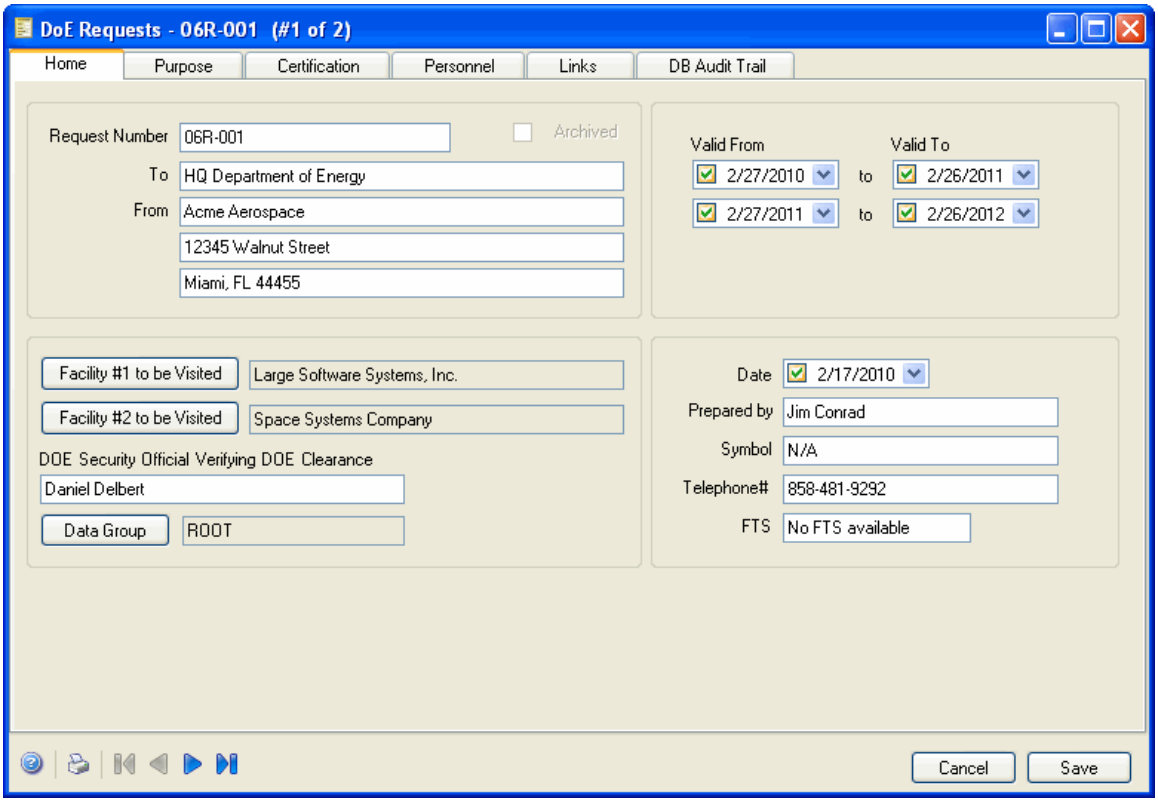
Input Screen Description
Home
Purpose
Certification
Personnel
Links

List Screen Description
Default Output List

Reports
Reports

DoE Outgoing Requests Input

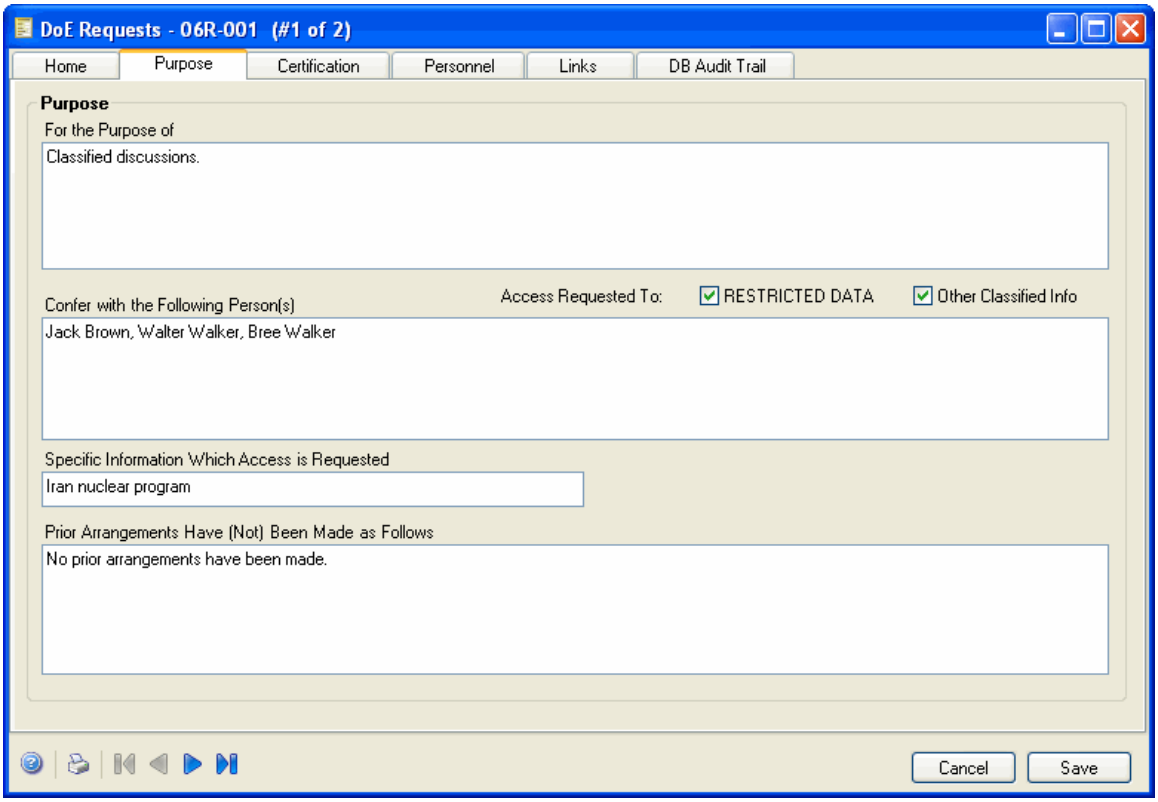
DoE Requests Home



For more information about using this screen, see Input Screen.
DoE Requests, Home Page Fields

Field Name	Description
Request #	This number can be assigned automatically, using the format defined in the Auto Numbering tab of the System Customization utility.
Archived	This field indicates whether the visit request has been archived (i.e., the To date exceeds the current date). The check box is always unchecked when a visit request is first entered and will be changed automatically upon expiration of the visit request period.
Data Group	The data group that the request belongs to. Data groups are defined in the User Management Data Groups dialog.
To	The appropriate DoE address.
From	The address of DoD organizations, or the user agency address for DoD contractors.
Facility #1 To Be Visited	The name of the facility to be visited (you may use DoE facility acronyms).
Facility #2 To Be Visited	The name of the facility to be visited (you may use DoE facility acronyms).
DoE Security Official Verifying DoE Clearance	The name of the individual.
Date	Date requested.
Prepared By	The individual who prepared this request.
Symbol	DoE contractors leave blank.
Telephone #	DoE contractors leave blank. User Agency/DoE organizations, fill in with commercial phone number. Do *not* use an Autovon number.
FTS	Enter the FTS.
Valid From	Enter inclusive dates.
Valid To	Enter inclusive dates.

DoE Requests Purpose



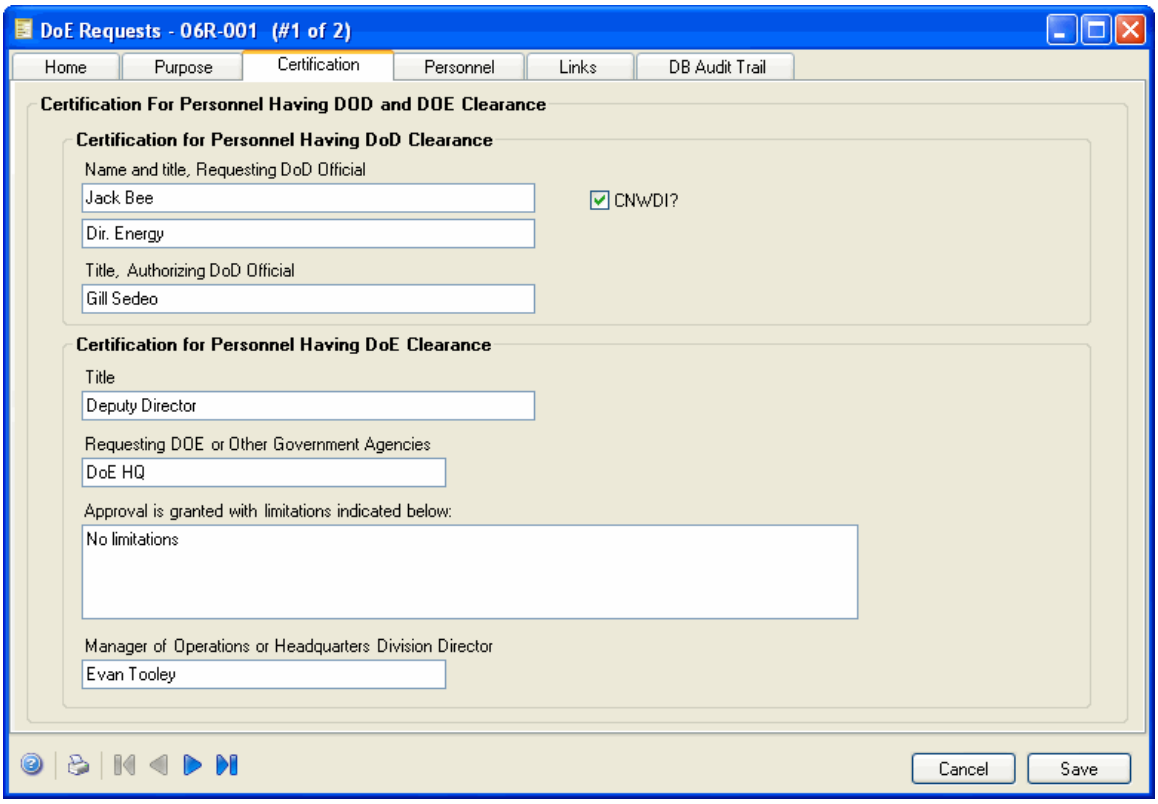
For more information about using this screen, see Input Screen.

DoE Requests, Purpose Page Fields

Field Name	Description
For the Purpose of	A short but explicit synopsis of purpose. If access to CNWDI is required, this portion must be written so that access is explicitly justified. Access is determined by the purpose and by the information to be released by the technical host.
Confer with the Following Person(s)	List a point of contact at each facility included on the visit request. This must be a DoE or DoE contractor employee; a DoD representative will not suffice. There is one exception: visits to the Nevada Operations Office (NV) and Nevada Test Site (NTS), in certain instances, may list the DOD contact.
Access Requested To	Indicates whether access is requested to RESTRICTED DATA and/or Other Classified Info.
Specific Information Which Access is Requested	Identifies the classification of the visit. Do *not* name Sigmas. DoE will authorize the appropriate Sigmas for the purpose stated if required by the visit and appropriately approved.

Prior Arrangements Have (Not) Been Made as Follows	Normally leave blank.

DoE Requests Certification

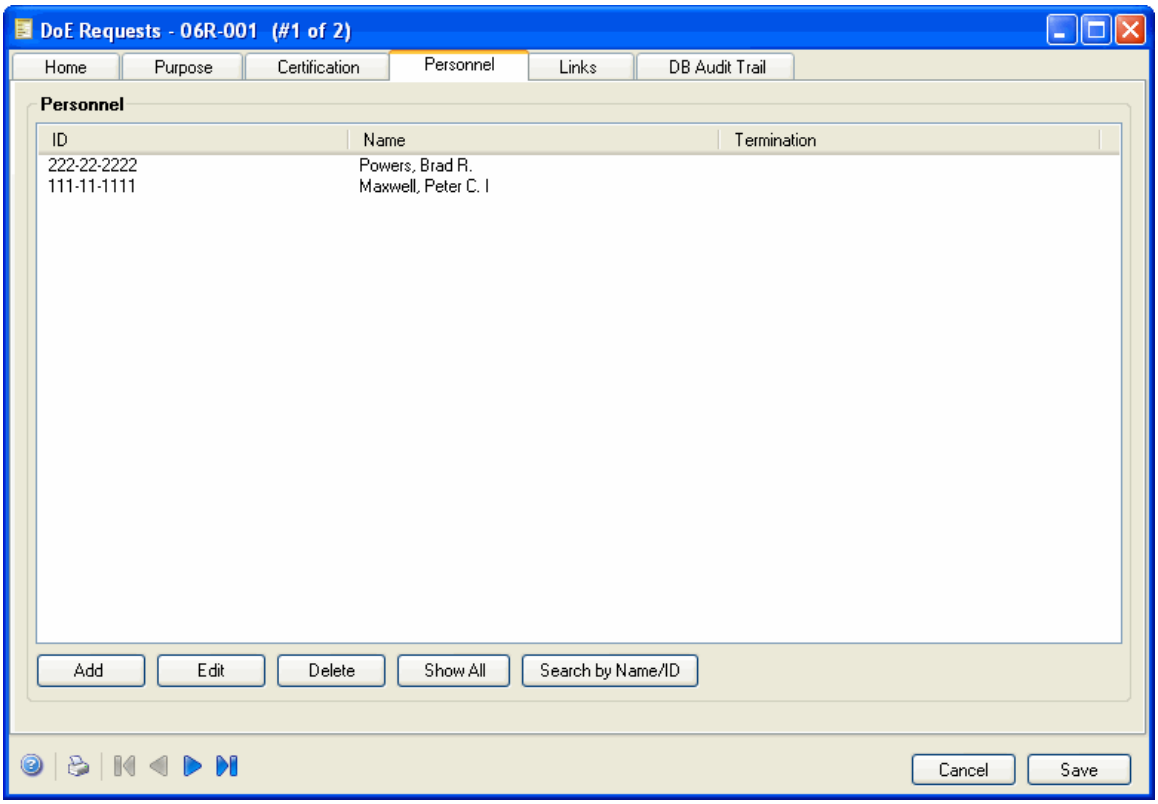


For more information about using this screen, see Input Screen.

DoE Request, Certification Page Fields

Field Name	Description
Certification for Personnel Having DoD Clearance	Contractors, leave these items blank; your user agency will complete them. DoD organizations need to fill these items out.
Certification for Personnel Having DoE Clearance	These items will be used by DoE.

DoE Requests Personnel

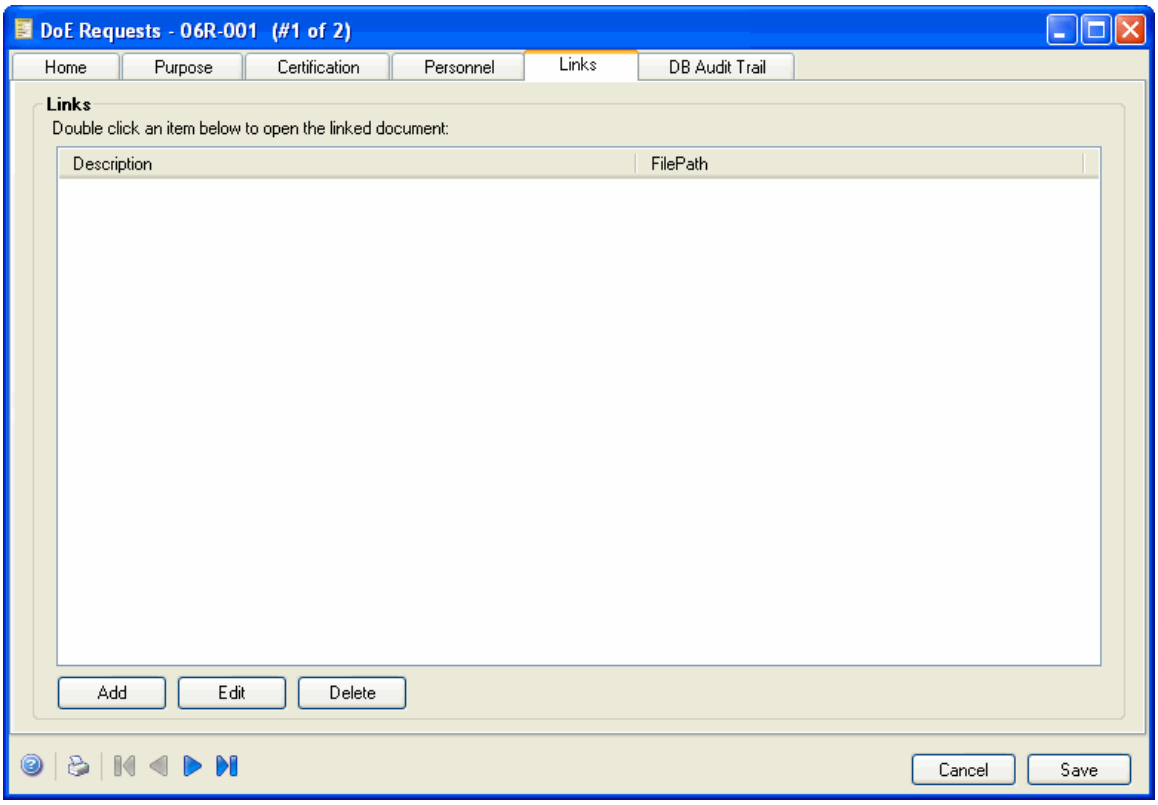


For more information about using this screen, see Input Screen.

DoE Requests, Personnel Page Fields

Field Name	Description
Search by Name/ID	Click or search for person by name or ID number.
ID	The person's ID number.
Name	The person's full name.
Termination	The person's termination date.

DoE Requests Links



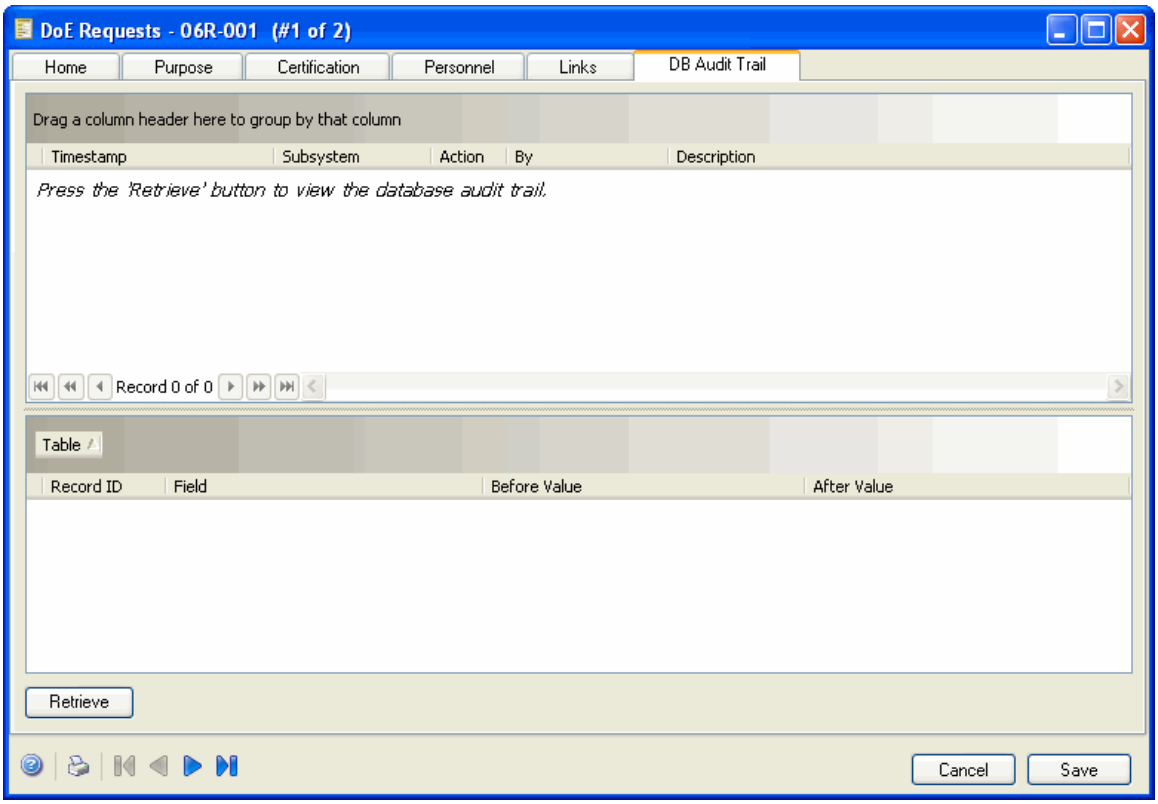
For more information about using this screen, see Input Screen.

DoE Requests, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

DoE DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

DoE Outgoing Requests, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

DoE Requests List

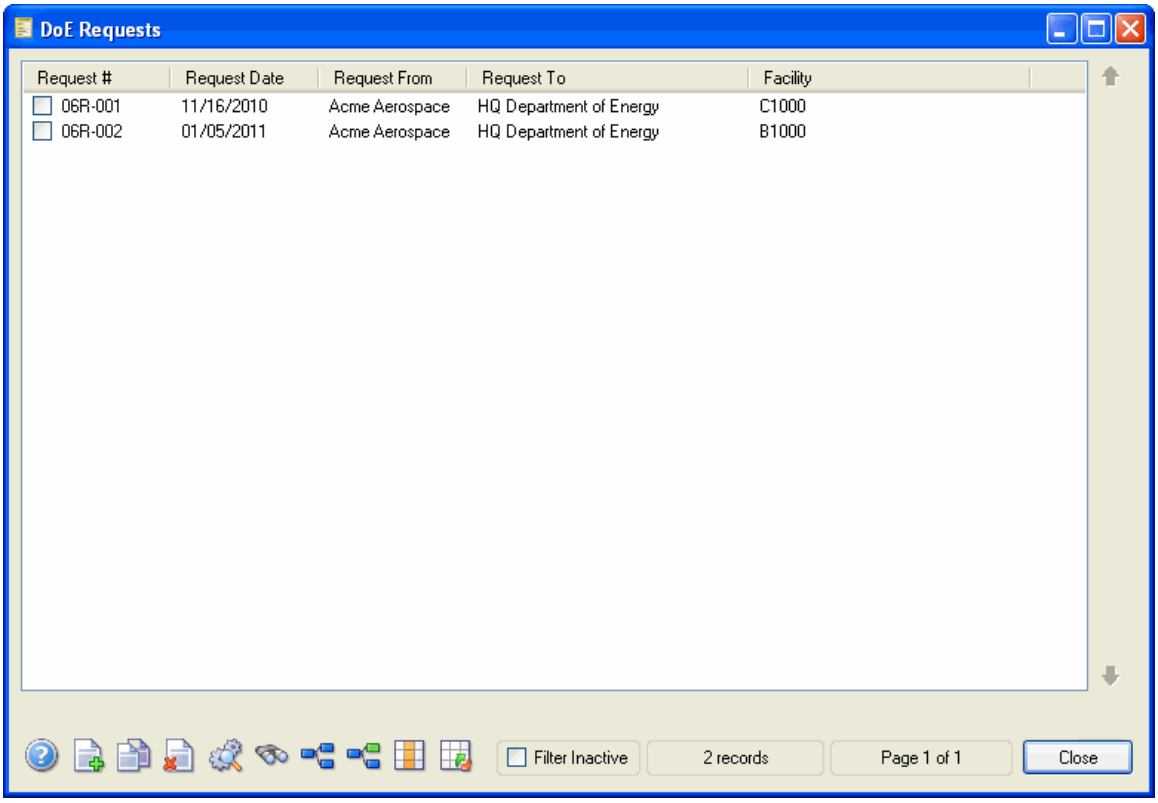
Default Output List

The DoE Requests default output list screen shows the Request #, Request Date, Request From, Request To, and Facility fields for each request record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.

- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** check box to show archived visit requests on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

DoE Requests Reports

DoE Requests Reports

Reports Menu
For more information about the default reports that appear in every module, see:

- Standard Reports

The rest of this page describes module-specific reports.

Print a Visit Request
To print a visit request, select the DoE Outgoing Request record from the Output List by highlighting it and then select the Detail Report from the Reports menu. The Visit Request can also be printed by clicking on the printer icon in the Input Screen of a DoE Outgoing Request record.

Termination & Regrade Letters
This report prints a visit termination or clearance regrade letter, for selected visit requests and selected visitors.

Requests about to Expire

This report prints a list of all visit requests that will expire within a user-specified date range.

SCI Outgoing Requests

Purpose of SCI Outgoing Requests

The SCI Outgoing Requests module fills out and prints the SCI Outgoing Requests Form.

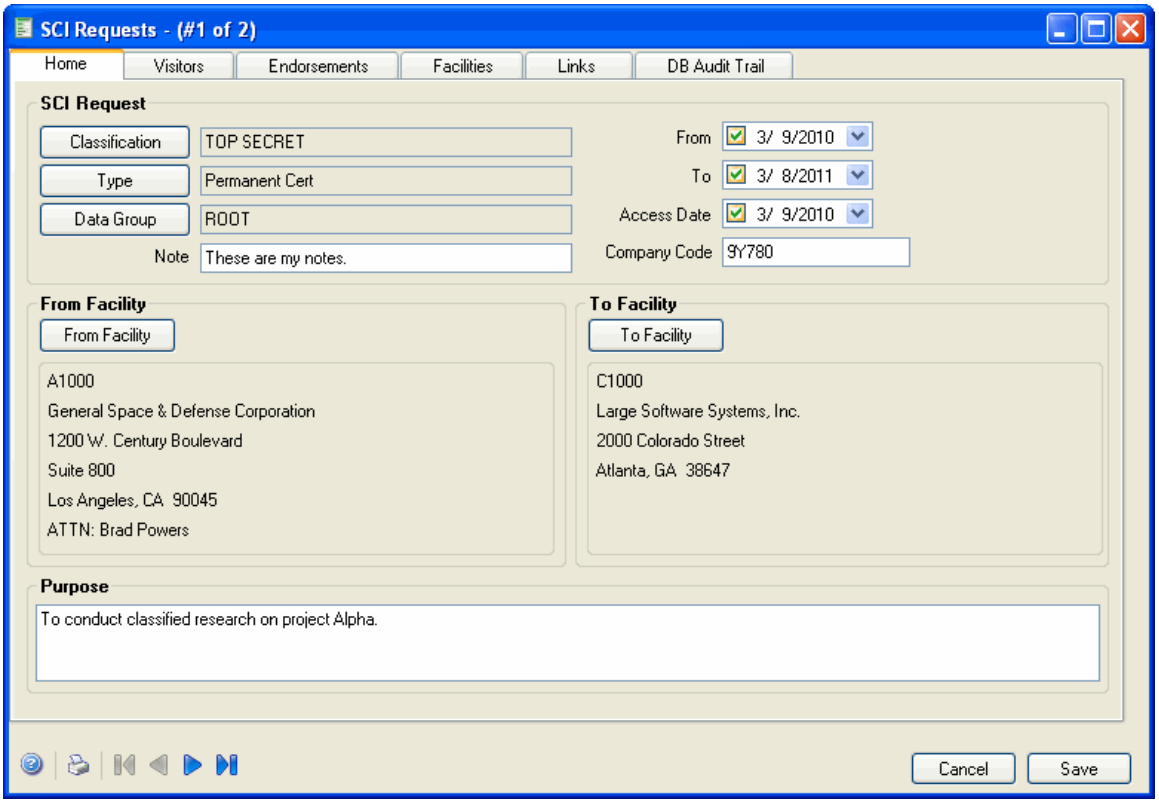
Input Screen Description
Home
Visitors
Endorsements
Facilities
Links

List Screen Description
Default Output List

Reports
Reports

SCI Outgoing Requests Input

SCI Outgoing Requests Home

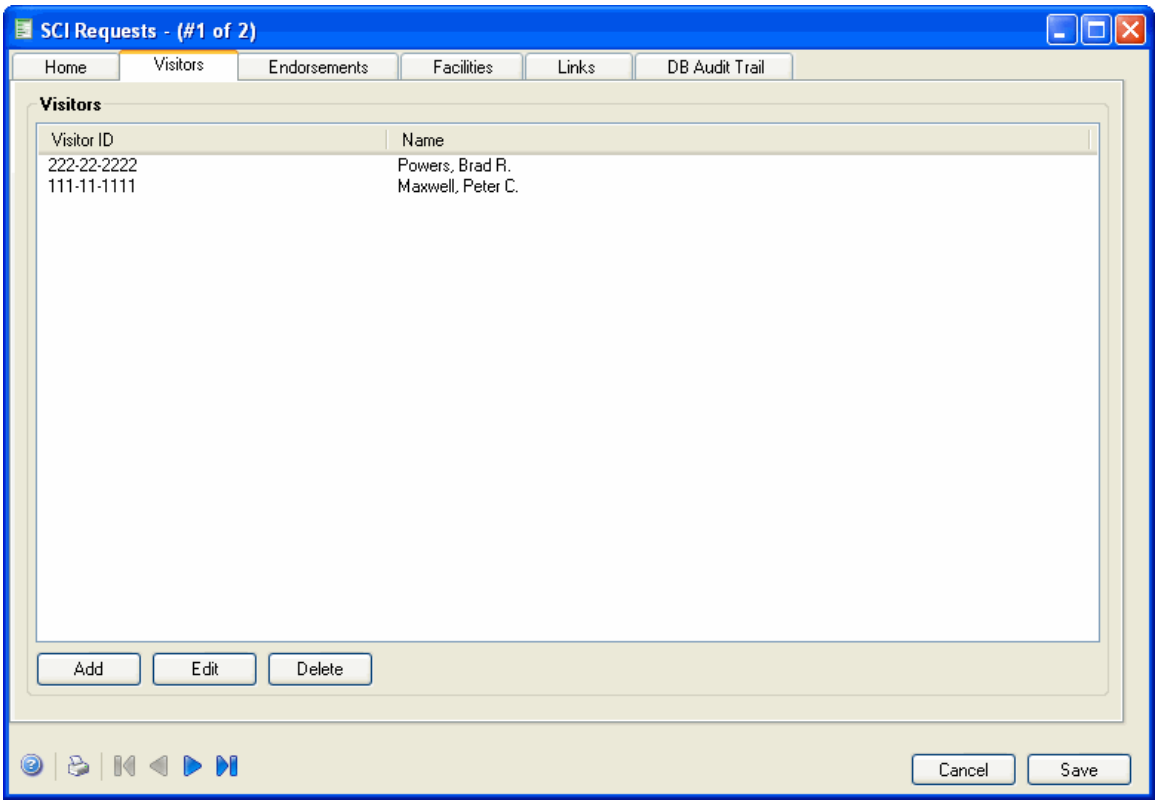


For more information about using this screen, see Input Screen.
SCI Outgoing Visit Requests, Home Page Fields

Field Name	Description

Classification	The highest level of classification that will be required for the visit.
Type	The type of visit access appropriate for this specific request.
From	The visit request start date.
To	The visit request end date.
Note	A brief description about the individual that will visit.
Company Code	The visitor's company code.
Access Date	The date of visit access appropriate for this specific request.
Data Group	The data group that the request belongs to. Data groups are defined in the User Management Data Groups dialog.
From Facility	To select a host facility, click **From Facility**.
To Facility	Click to select the facility where the request is being sent.
Purpose	A brief description of the reason for the visit. This information is printed on the visit request report under the heading "Purpose of Visit."

SCI Outgoing Requests Visitors

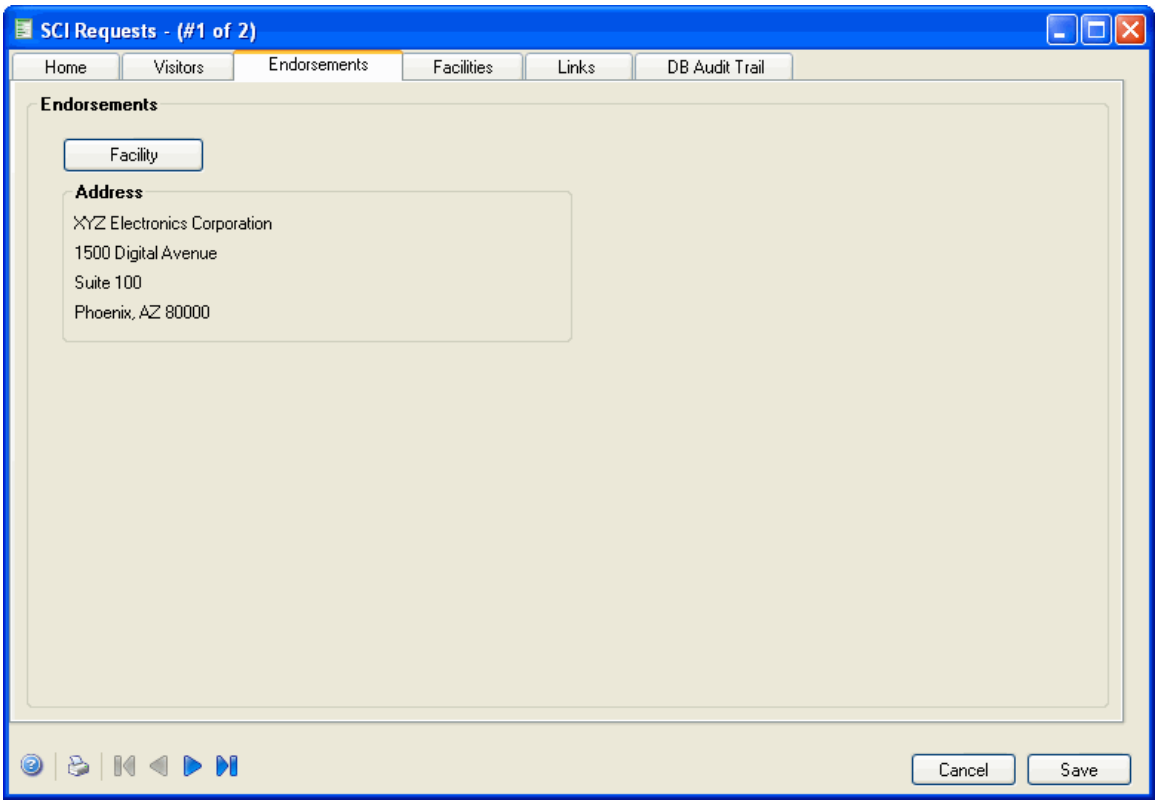


For more information about using this screen, see Input Screen.

SCI Requests, Visitors Personnel Page Fields

Field Name	Description
Visitor ID	Visitor's ID number.
Name	Visitor's full name.

SCI Outgoing Requests Endorsements

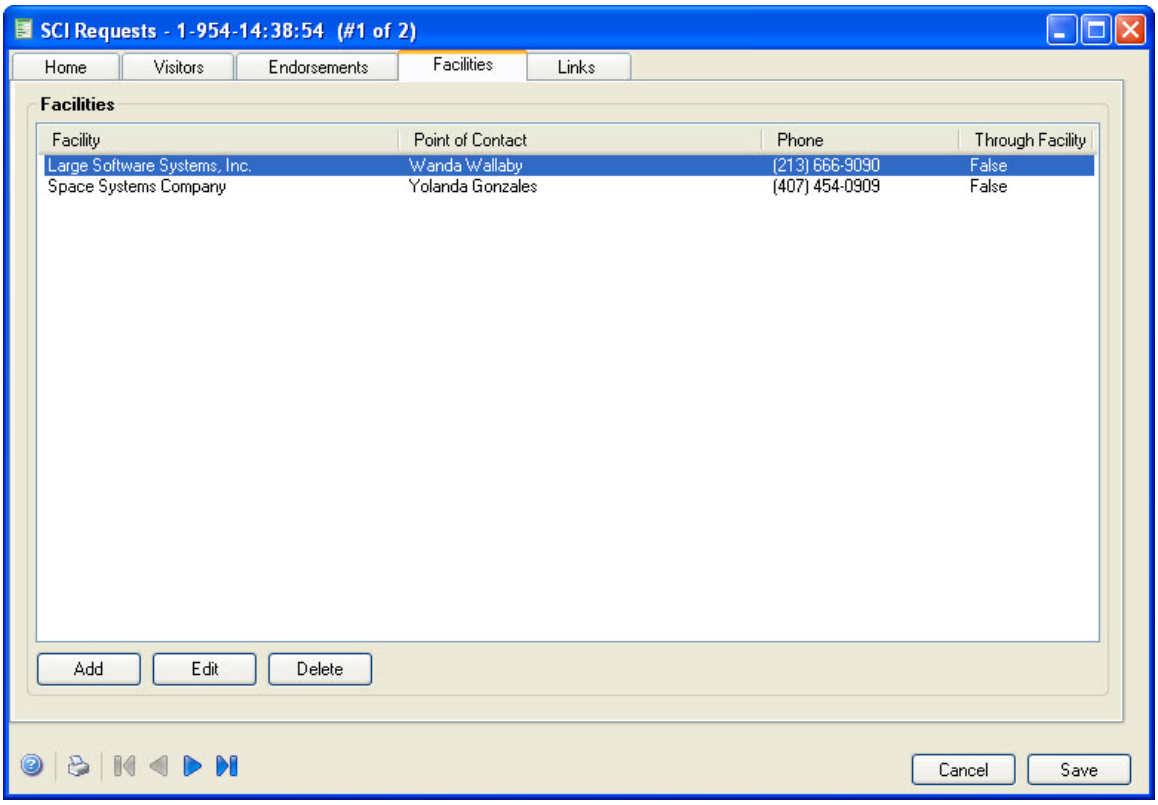


For more information about using this screen, see Input Screen.

SCI Requests, Endorsements Page Fields

Field Name	Description
Facility	Click to select the facility name and address endorsing the visit.

SCI Outgoing Requests Facilities

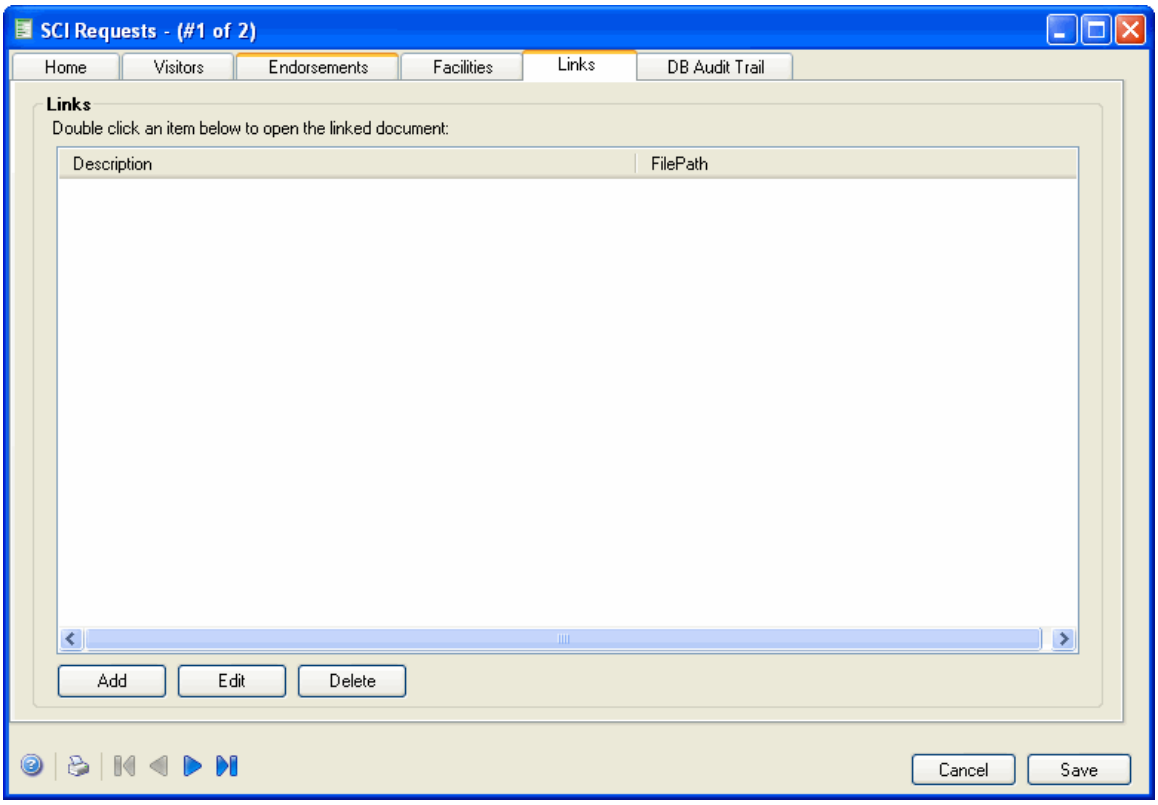


For more information about using this screen, see Input Screen.

SCI Requests, Facilities Page Fields

Field Name	Description
Facility	Name of the facility to be visited.
Point of Contact	The point of contact at the facility to be visited.
Phone	The point of contact's telephone number at the facility to be visited.
Through Facility	Indicates a true or false.

SCI Outgoing Requests Links



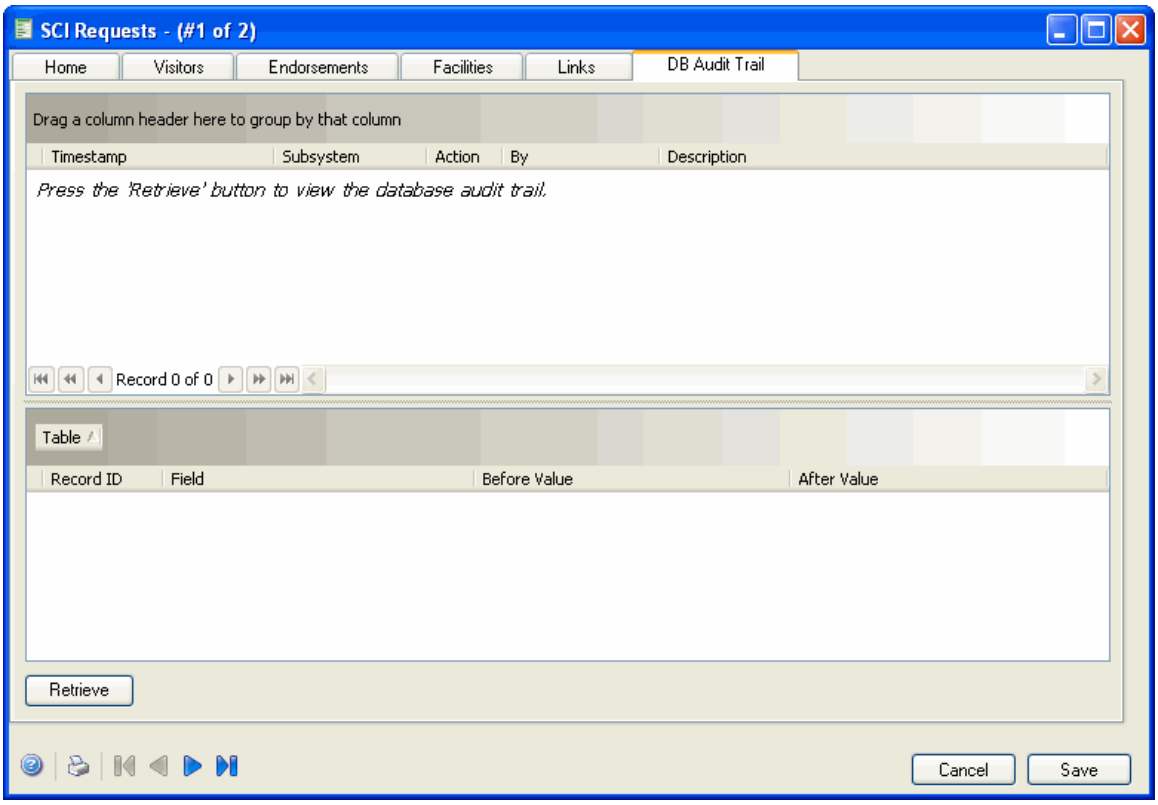
For more information about using this screen, see Input Screen.

SCI Requests, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

SCI DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

SCI Outgoing Requests, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

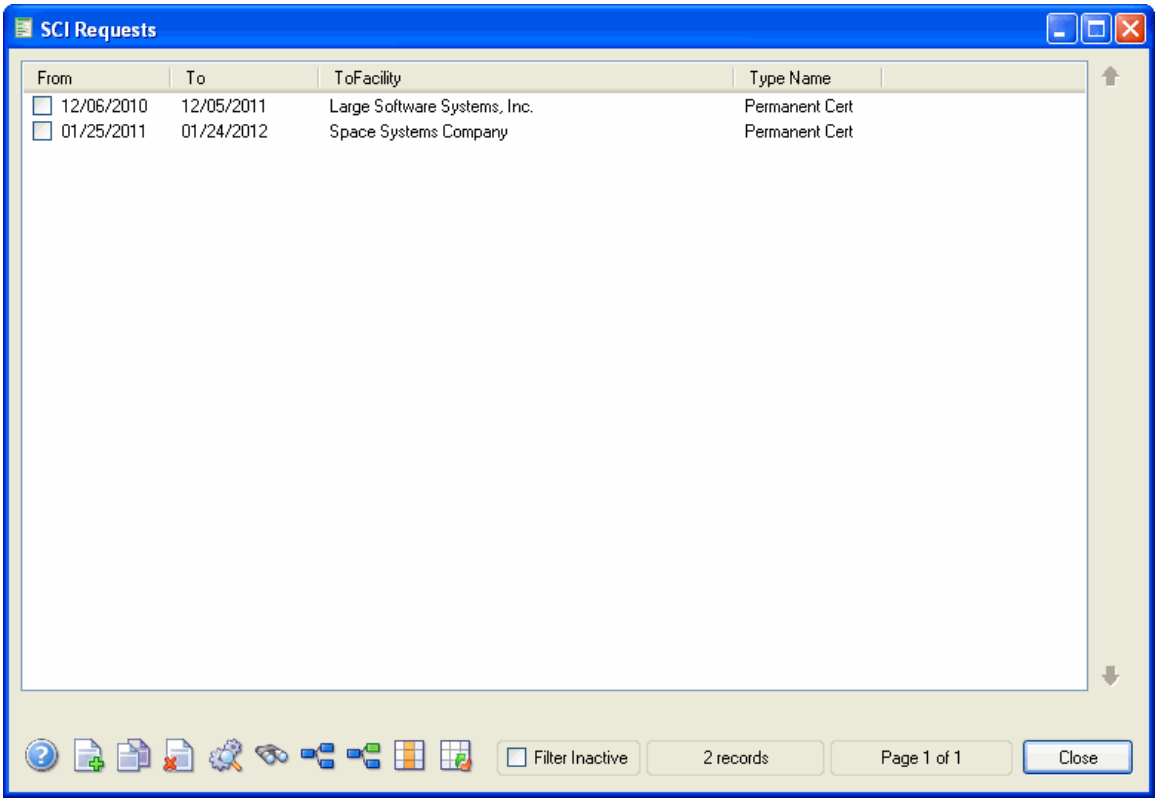
SCI Requests List

Default Output List

The SCI Requests default output list screen shows the Request Type, Purpose, From and To Dates, and To Facility fields for each request record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** check box to show archived visit requests on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

SCI Outgoing Requests Reports

SCI Outgoing Requests Reports

Reports Menu
For more information about the default reports that appear in every module, see:

- Standard Reports

The rest of this page describes module-specific reports.

Print a Visit Request
To print a visit request, select the SCI Outgoing Request record from the Output List by highlighting it and then select the Detail Report from the Reports menu. The Visit Request can also be printed by clicking on the printer icon in the Input Screen of a SCI Outgoing Request record.

Visitors

Purpose of Visitors

Visitors maintains information about the personnel who visit your facility.

The Visitors module provides control for visitors that actually come to the facility. An accounting of all visitors to the facility will be available for audit trails. Incoming Visitor Control has an Entry Control screen for checking visitors in and out of your facility. In addition, you can print visitor badges.

Visitors

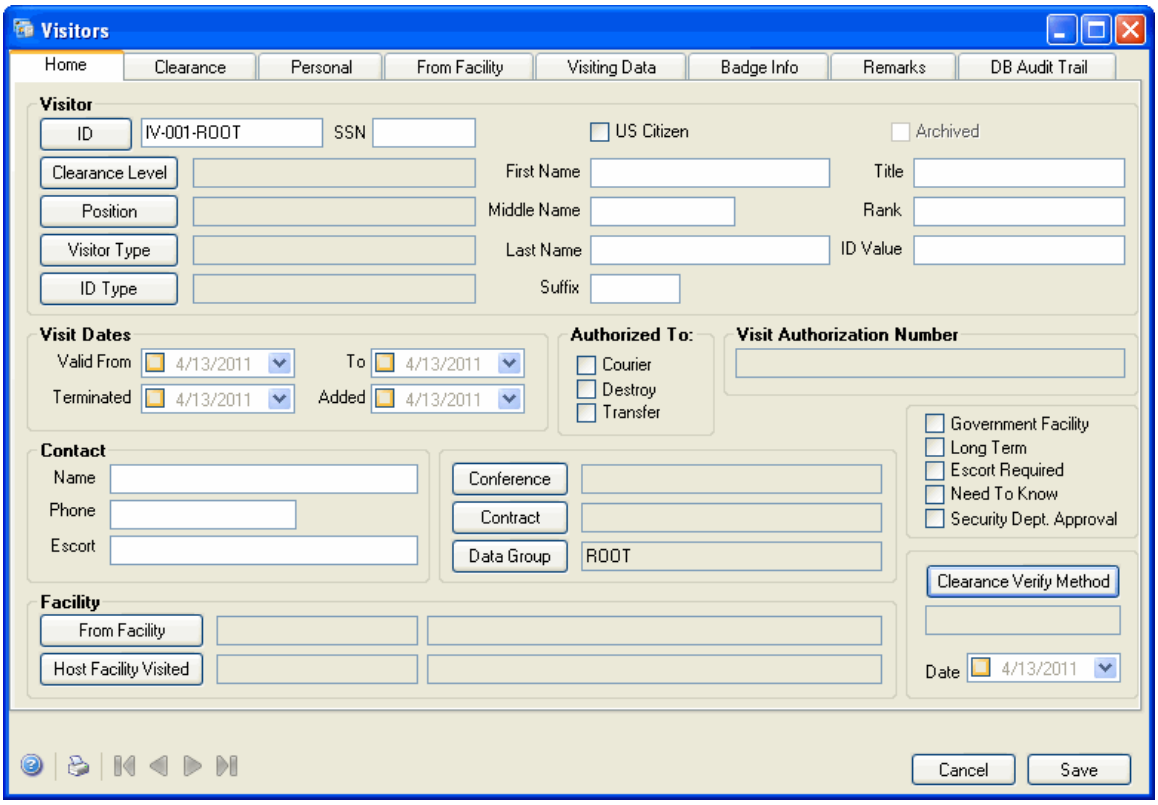
Input Screen Description
Home
Clearance Info
Personal Info
From Facility
Visiting Data
Badge Info
Remarks

List Screen Description
Default Output List

Reports
Reports

Visitors Input

Visitors Home



For more information about using this screen, see Input Screen.

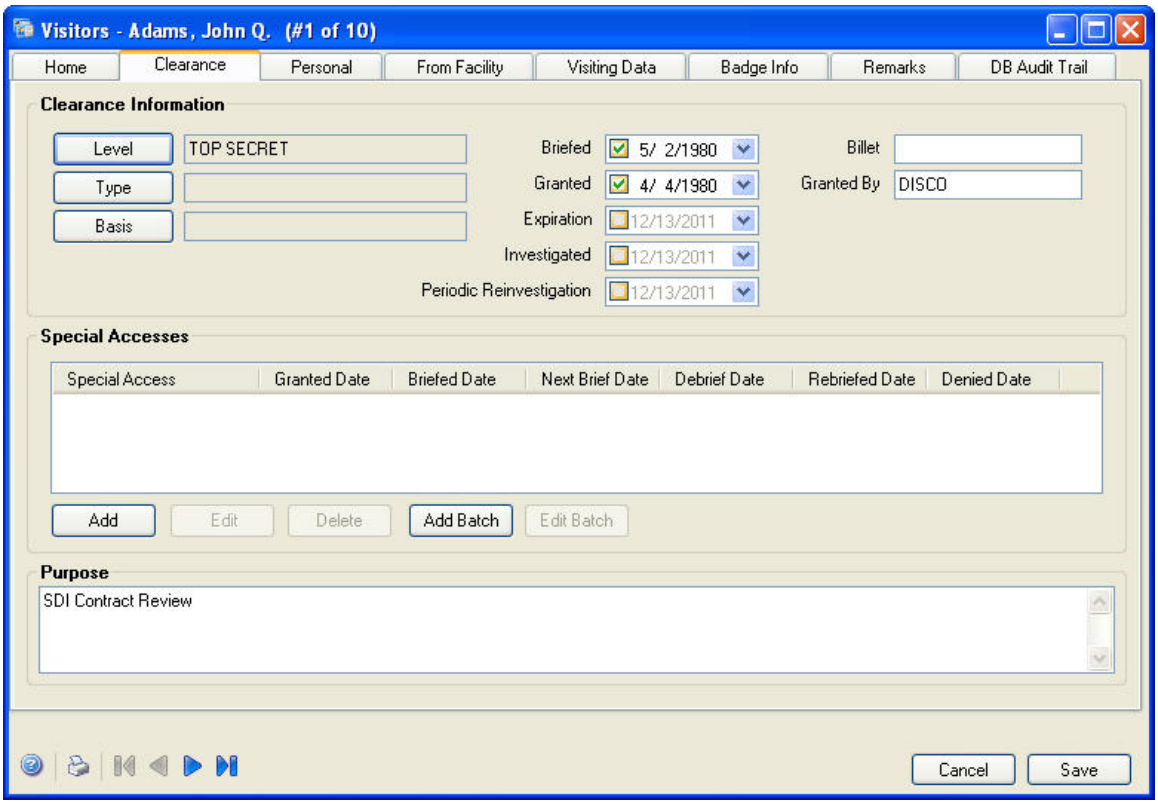
Visitors, Home Page Fields

Field Name	Description
ID	The ID of the visitor. Each Incoming Visitor Control record contains one individual visitor. If more than one person is listed on an incoming visit authorization, a separate record must be entered for each visitor. ID is not a unique field and is not required. Visitor records can be used by more than one Visit Authorization.
US Citizen	Check this box if the visitor is a U.S. citizen.
SSN	The Social Security Number of the visitor.
Archived	This box is checked if the To Date has expired.
First Name, Middle Name, Last Name, Suffix	The visitor's name.
Clearance Level	The visitor's clearance level. The rest of the clearance info is on the Clearance Info tab.
Position	The visitor's job function.
Title	The visitor's job title.

Rank	The visitor's rank (if military).
Visitor Type	The type of visitor. You can use this to generate reports grouped by type of visitor.
ID Type	The type of ID the visitor has to present for verification, such as a driver's license or passport.
ID Value	The ID number, such as a driver's license number or passport number.
Valid From	The start date of the visit request.
To	The end date of the visit request.
Terminated	If the request was terminated early, the termination date.
Added	The date this record was created.
Authorized to	Check the appropriate box to indicate if this person is authorized to destroy documents, externally transfer documents, and/or be an authorized courier.
Visit Authorization	The Visit Authorization number that the visitor record is associated with.
Contact Name	Point of contact name at your facility for this visitor.
Phone	Point of contact phone number at your facility for this visitor.
Escort	Escort name for this visitor.
Conference Name	Conference or meeting this visitor is attending, if applicable. When a Visitor or Visit Authorization record that contains a reference to a Conferences record is saved, those visitors will not be automatically added to the referenced Conference record. See the topic Conferences Attendees which explains how to add pre-designated visitors to a conference record.
Contract	Click to select the Contract ID for this visit.
From Facility	Click to select the facility that the visitor is coming from. Displays the name and the CAGE Code or other ID for the visitor's facility.

Host Facility	Click to select the facility that the visitor is going to visit. Displays the name and the CAGE Code or other ID for the host facility.
Government Facility?	Check this box if the visitor is from a government facility.
Long Term?	If the visitor is a long-term visitor, check this box.
Escort Required	Check this box if an escort is required for this visitor.
Need To Know	Check this box if the visitor has "Need To Know".
Security Dept. Approval	Check this box if the security department has approved this visitor.
Clearance Verify Method	Click to select the Clearance Verify Method from a pick list.
Date	Indicates the date that Clearance was verified. When performing a visitor check-in transaction, the 'Clearance Verified On' date supplied during the transaction is reflected here.
Data Group	The data group that the Visitor belongs to. Data groups are defined in the User Management Data Groups dialog.

Visitors Clearance Info



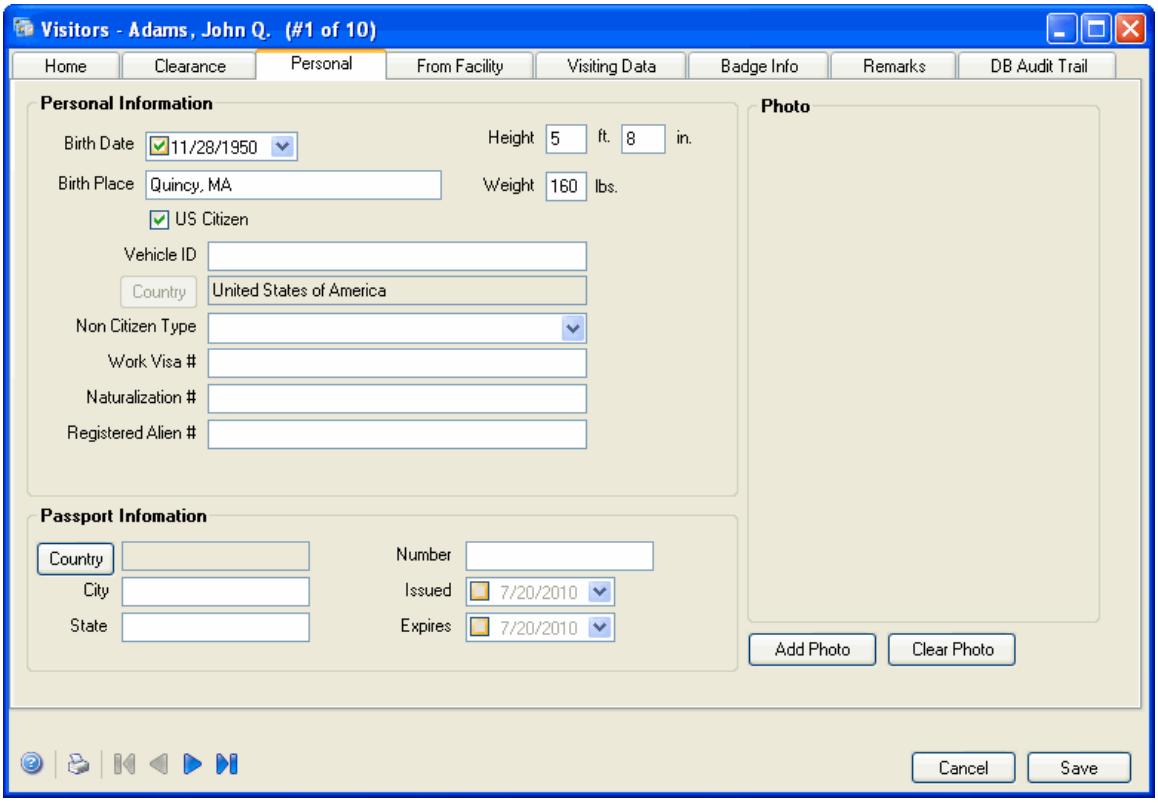
For more information about using this screen, see Input Screen.

Visitors, Clearance Info Page Fields

Field Name	Description
Level	The visitor's clearance level.
Type	The clearance level type.
Briefed	The date of the last briefing for the person's security clearance.
Expiration	The date the clearance will expire.
Investigated	The date of investigation associated with the basis of the clearance.
Type	The type of clearance.
Granted	The date the person's clearance was granted.
Billet	A billet number associated with the visitor's security clearance.
Basis	The basis for the other clearance investigation.

Granted By	The name of the agency that granted the clearance.
Periodic Reinvestigation	The next reinvestigation date.
Special Accesses	The list of special accesses the visitor has on the selected Visit Authorization. Choose the Add or Edit button to modify the Special Access name and related fields. Click the Add Batch button to add several special accesses at once. The access must have the same dates and other attributes. Click the Edit Batch button to perform a batch update to any number of special accesses for a single visitor record.
Purpose	The purpose of the visit.

Visitors Personal Info



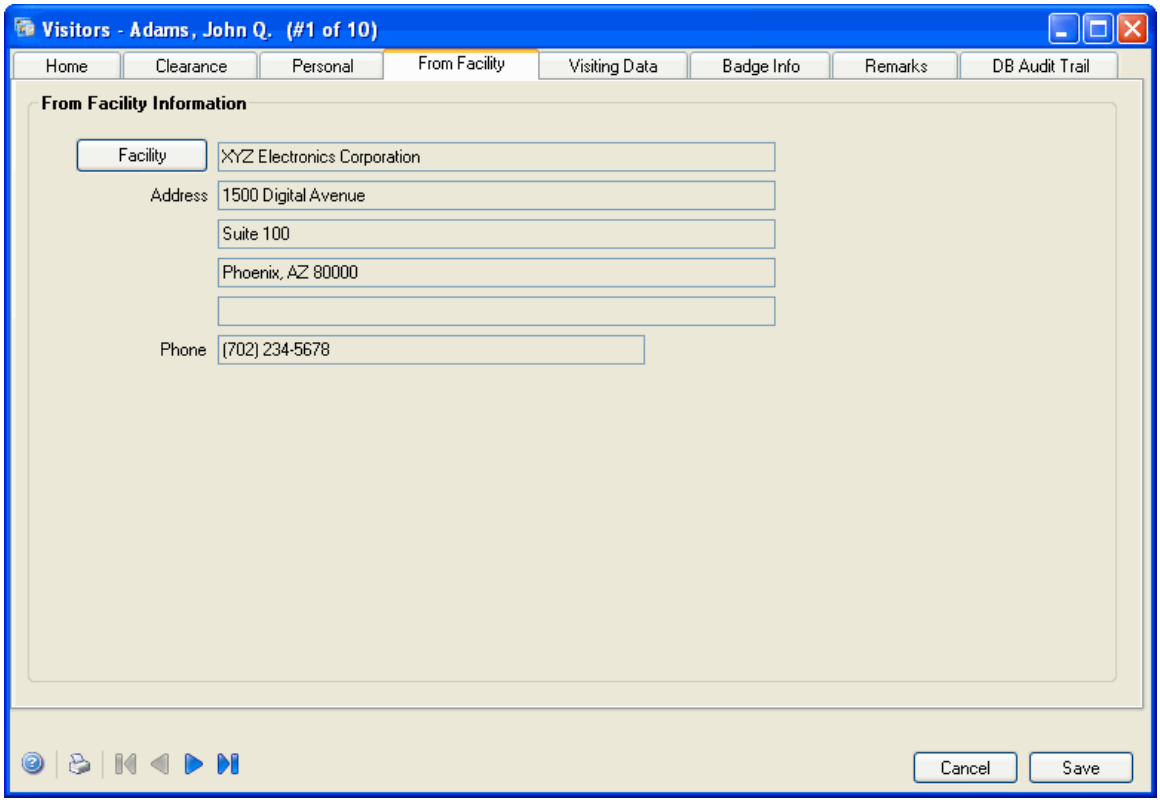
For more information about using this screen, see Input Screen.

Visitors, Personal Info Page Fields

Field Name	Description
Birth Date	The visitor's date of birth.

Place	The visitor's place of birth.
Height	The visitor's height.
Weight	The visitor's weight.
Vehicle ID	Information about the visitor's vehicle, if it is parked at your facility.
US Citizen	Check this box if the visitor is a U.S. citizen.
Country of Citizenship	The country of citizenship.
Non-Citizen Type	For non-U.S. citizens, select Dual Citizenship, U.S. Person, or Foreign Person.
Work Visa #	The number of the visitor's work visa if applicable.
Naturalization #	The visitor's naturalization number, if applicable.
Registered Alien #	The visitor's registered alien number, if applicable.
Country	The country where the passport was issued.
City	The city where the passport was issued.
State	The state where the passport was issued.
Number	The passport number.
Issued	The date that the passport was issued.
Expires	The date that the passport expires.
Photo	The person's photograph.
Add Photo	Click to select a photo for the record. The maximum file size can be changed in Utilities > System Customization > Maximum Image size. The file size maximum is set at 1000 kb. However, the maximum size can be set up to 10000 kb.
Clear	Click to remove the photo from the record.

Visitors From Facility

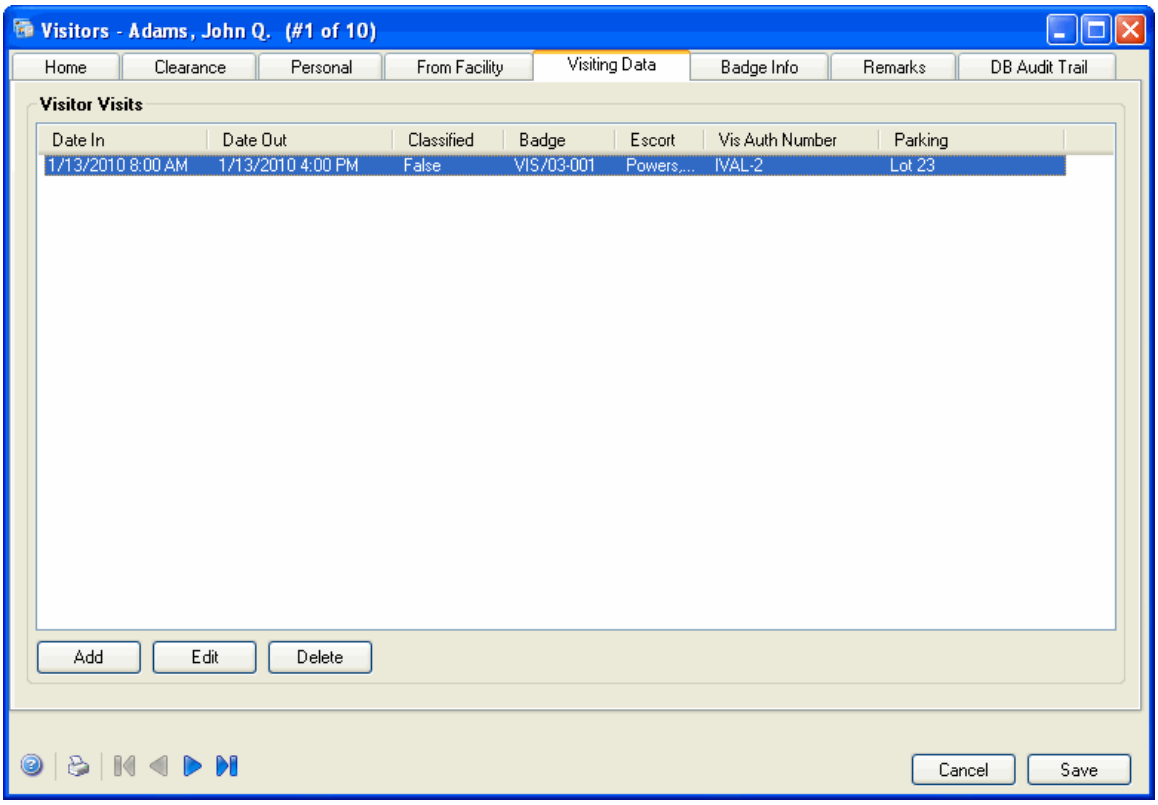


For more information about using this screen, see Input Screen.

Visitors, From Facility Page Fields

Field Name	Description
Facility Name	Click to select the facility that the visitor is coming from. Displays the CAGE Code or other ID for the visitor's facility.
Address	Name and address of the visitor's facility.
Phone	Phone for the visitor's facility.

Visitors Visiting Data

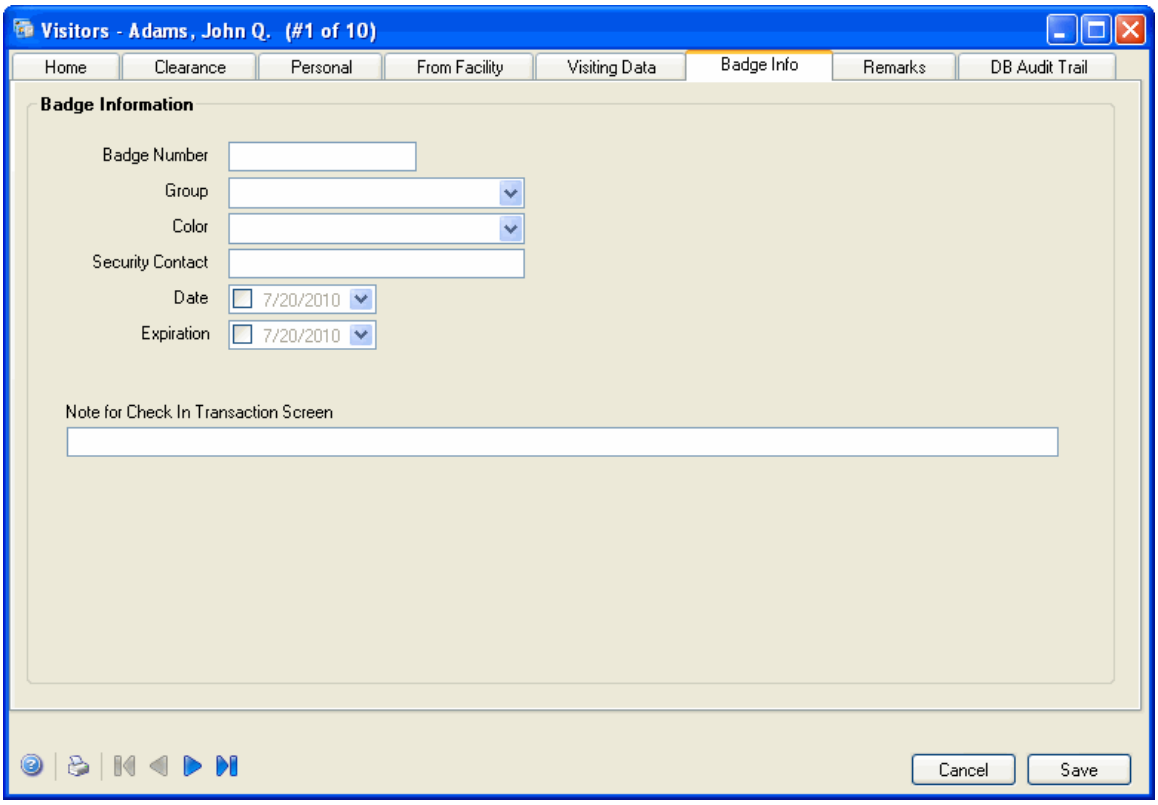


For more information about using this screen, see Input Screen.

Visitors, Visiting Data Page Fields

Field Name	Description
Visiting Data	Each time that the visitor visits the facility, a record may be made as to the date, time in/out, classified visit, badge number, escort's name, and parking number assigned. Note that this information may be entered sometime after the visit actually occurred, transcribing the information from a visitor sign-in sheet. You can manage information about visitors via the Transactions menu in the Visitor's output list screen as visitors are checked in and out.

Visitors Badge Info

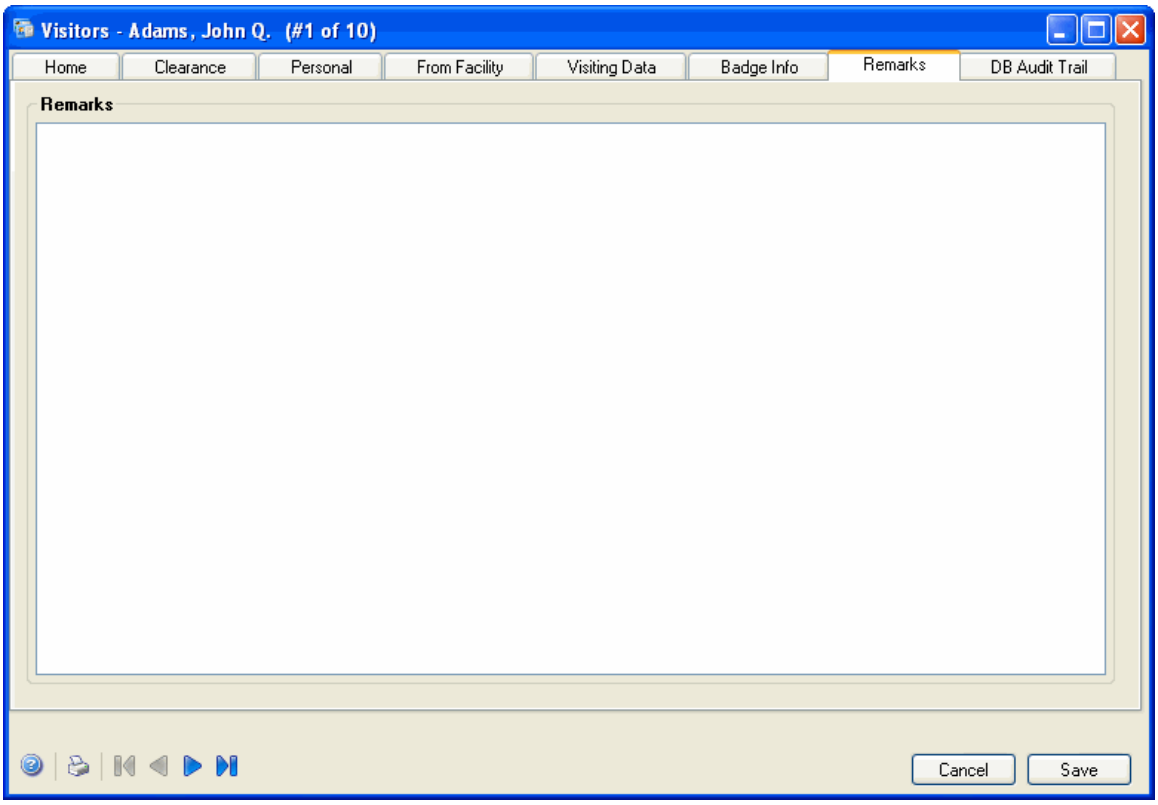


For more information about using this screen, see Input Screen.

Visitors, Badge Info Page Fields

Field Name	Description
Badge Number	Badge number.
Group	Badge group.
Color	Badge color.
Security Contact	Name of a contact for this badge.
Date	Badge date.
Expiration	Date the badge expires.
Note for Check In Transaction Screen	This field is displayed on the Visitor Check In screen to display any information the receptionist or guard needs to see about this visitor.

Visitors Remarks



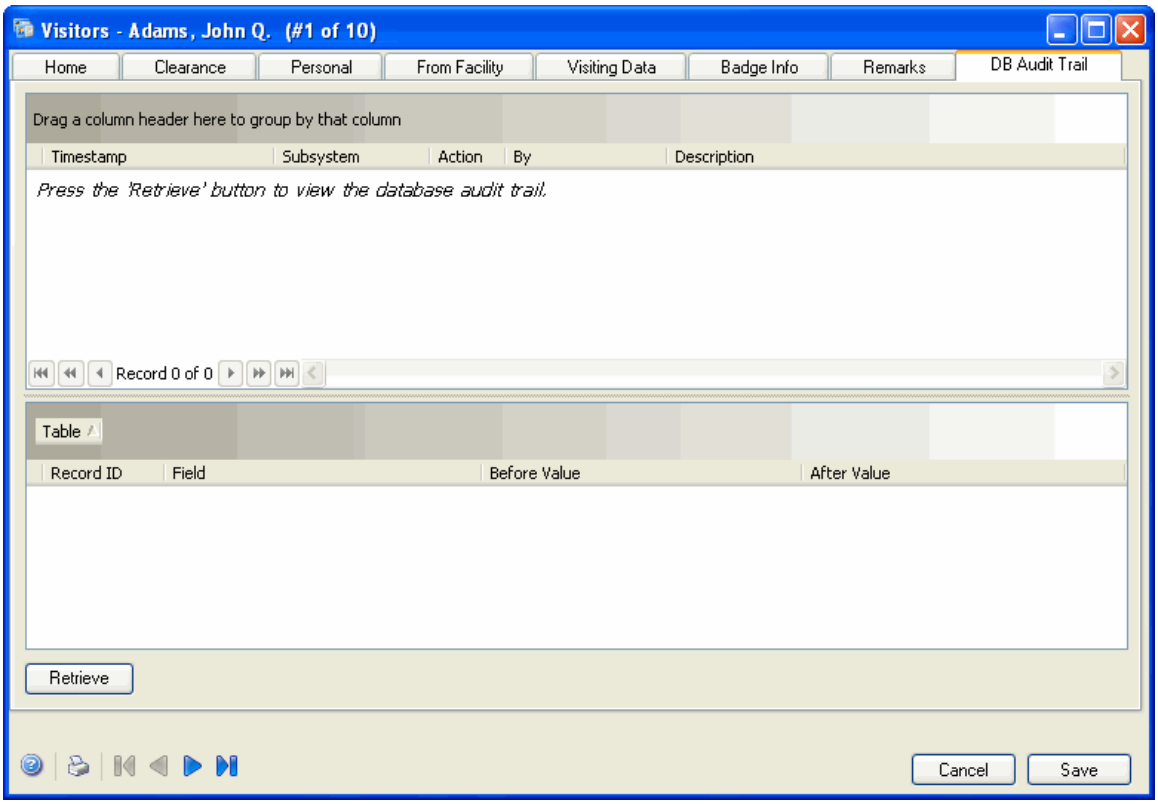
For more information about using this screen, see Input Screen.

Visitors, Remarks Page Fields

Field Name	Description
Remarks	Free-form textual information (up to 32k bytes of text).

Visitors DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Visitors, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

Visitors List

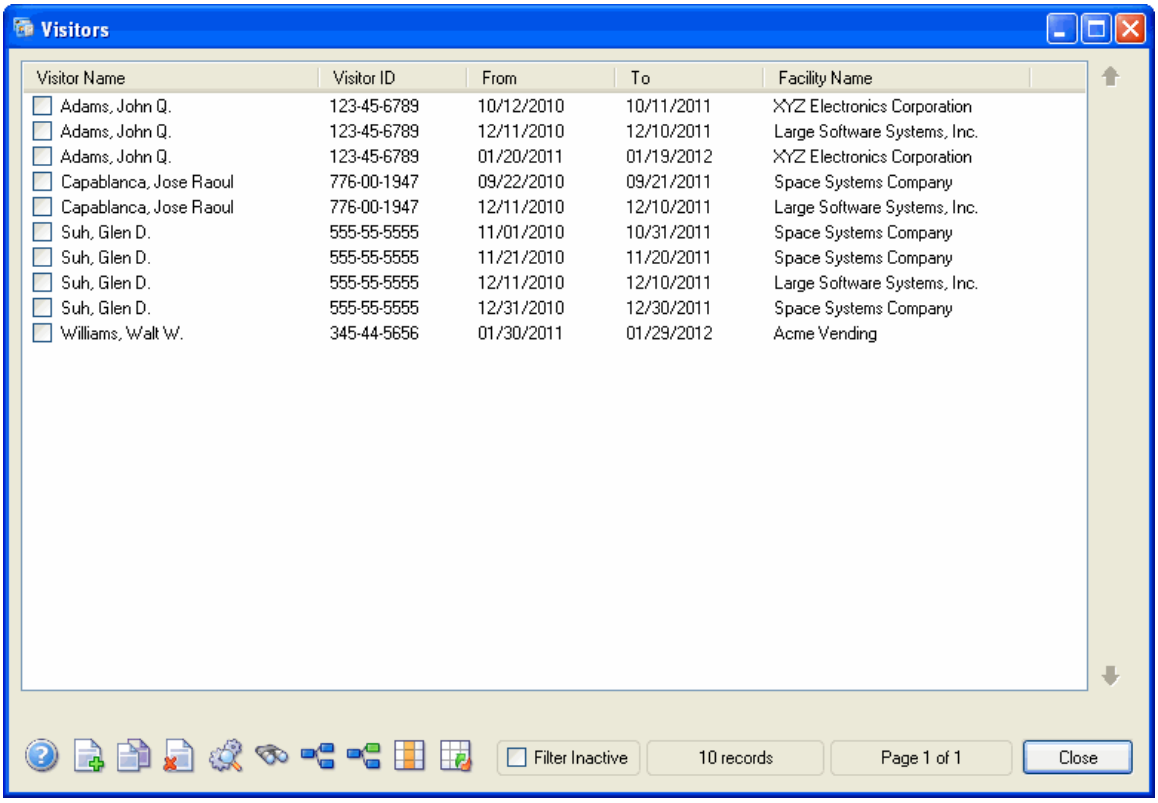
Default Output List Screen

The Visitors default output list screen shows the Visitor ID, Visitor Name, From and To Dates, and Facility Name for each visitor record in the database. If a visitor appears more than one time here, it's because they can be attached to more than one Visit Authorization.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.

- Double-click on a record to open an input screen where you can modify the fields.


Visitors
Visitor Name
Visitor ID
From
To
Facility Name
Adams, John Q. 123-45-6789 10/12/2010 10/11/2011 XYZ Electronics Corporation
Adams, John Q. 123-45-6789 12/11/2010 12/10/2011 Large Software Systems, Inc.
Adams, John Q. 123-45-6789 01/20/2011 01/19/2012 XYZ Electronics Corporation
Capablanca, Jose Raoul 776-00-1947 09/22/2010 09/21/2011 Space Systems Company
Capablanca, Jose Raoul 776-00-1947 12/11/2010 12/10/2011 Large Software Systems, Inc.
Suh, Glen D. 555-55-5555 11/01/2010 10/31/2011 Space Systems Company
Suh, Glen D. 555-55-5555 11/21/2010 11/20/2011 Space Systems Company
Suh, Glen D. 555-55-5555 12/11/2010 12/10/2011 Large Software Systems, Inc.
Suh, Glen D. 555-55-5555 12/31/2010 12/30/2011 Space Systems Company
Williams, Walt W. 345-44-5656 01/30/2011 01/29/2012 Acme Vending
Filter Inactive
10 records
Page 1 of 1
Close

Filter Inactive
Check the **Filter Inactive** check box to prevent archived visitors from appearing on this output screen.
For more information about using this screen, see:

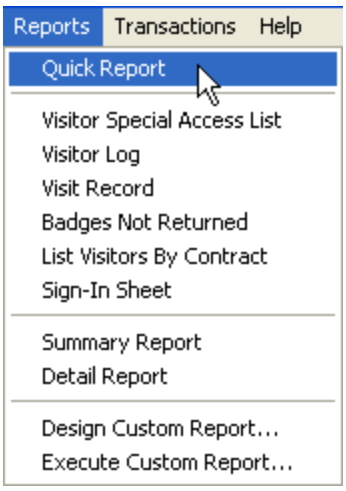
- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Visitors Reports

Reports Menu
For more information about the default reports that appear in every module, see:

- Standard Reports

The rest of this page describes module-specific reports.



Visitors Reports Menu

Visitor Special Access List
This report prints a list of the selected visitors in 2 possible formats.
By VAL
This lists each visitor with a summary of data from the Visit Authorization including the clearance, from and to dates, and the special accesses. The special accesses are grouped by VAL.
By Special Access
This lists each visitor with a summary of data from the Visit Authorization including the clearance, from and to dates, and the special accesses. The special accesses are grouped in sorted order and broken out by individual VALs.

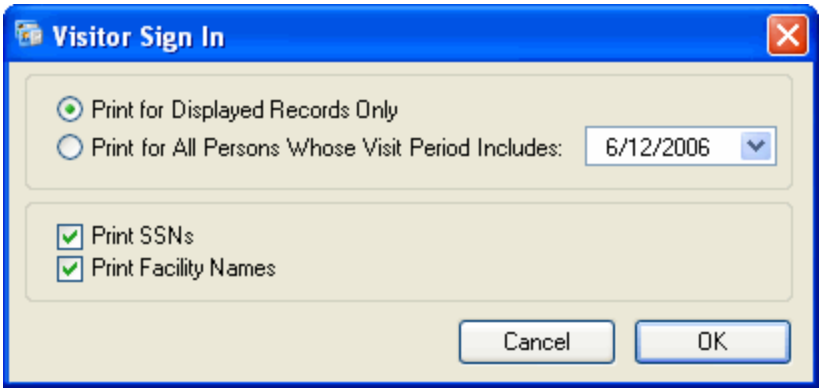
Visitor Log
This report prints a list of all visitors that may be visiting the facility during a specified time span. The visitor log is useful for verifying visitors as they enter the facility.

Visitor Record
This report prints a record of visitors during a specified time span. In the dialog, check the option "Use Only Records Currently Displayed" if the report should only display the records that are currently filtered in the output list screen that fit the time span. If left unchecked, the report will display all visitors within the time span.

Badges Not Returned
This report prints a list of visitors that have visited your site (checked in and checked out) without returning a badge.

List of Visitors by Contract
This report prints a list of all visitors associated with the specified Contract ID. Each visitor is listed with their name, social security number, company represented, and the beginning and ending dates for the visit. The report prompts for the Contract ID.

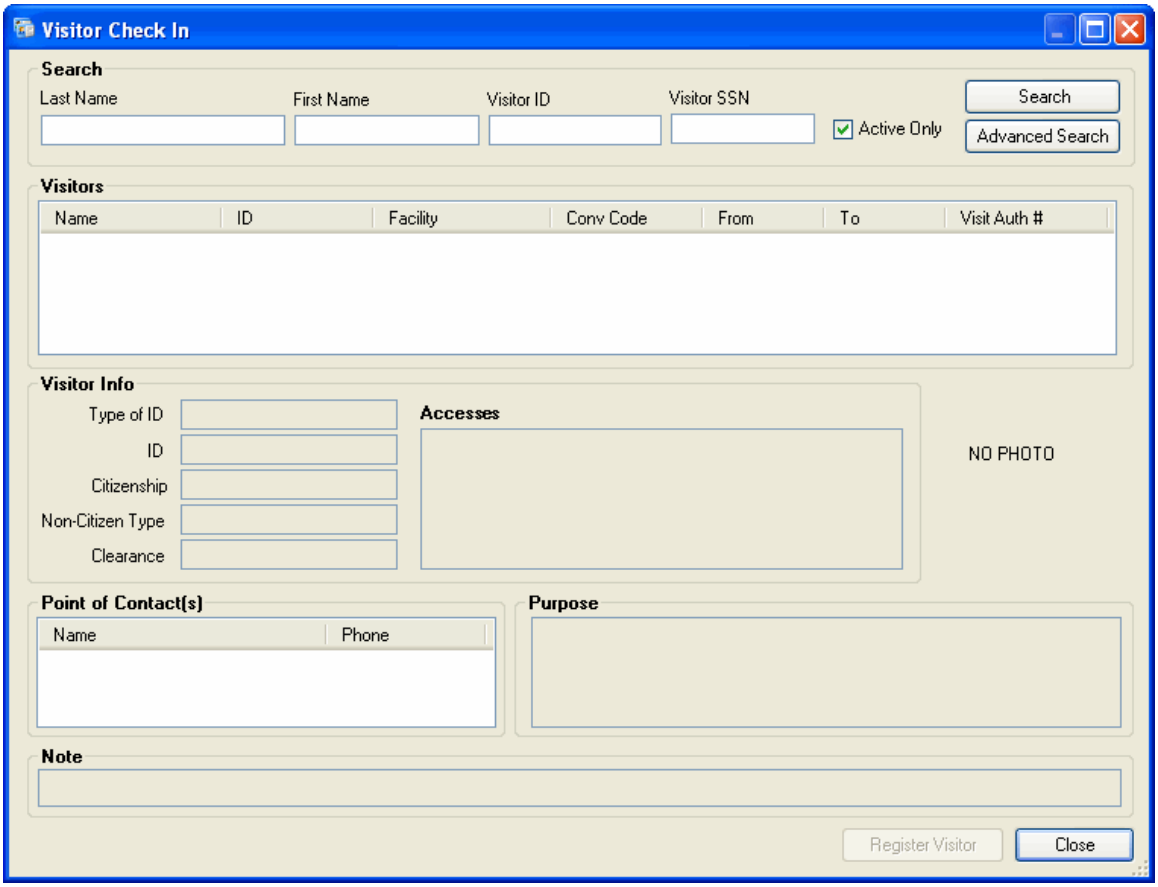
Sign-In Sheet
This report prints a sign-in sheet for the selected visitors, sorted alphabetically by visitor name.



Visitors Transactions

Visitors Check In

The Visitors Check In screen is accessed by clicking **Visitors Check In** from the Transactions menu.



For more information about using this screen, see Input screen.

Visitors Check In Page Fields

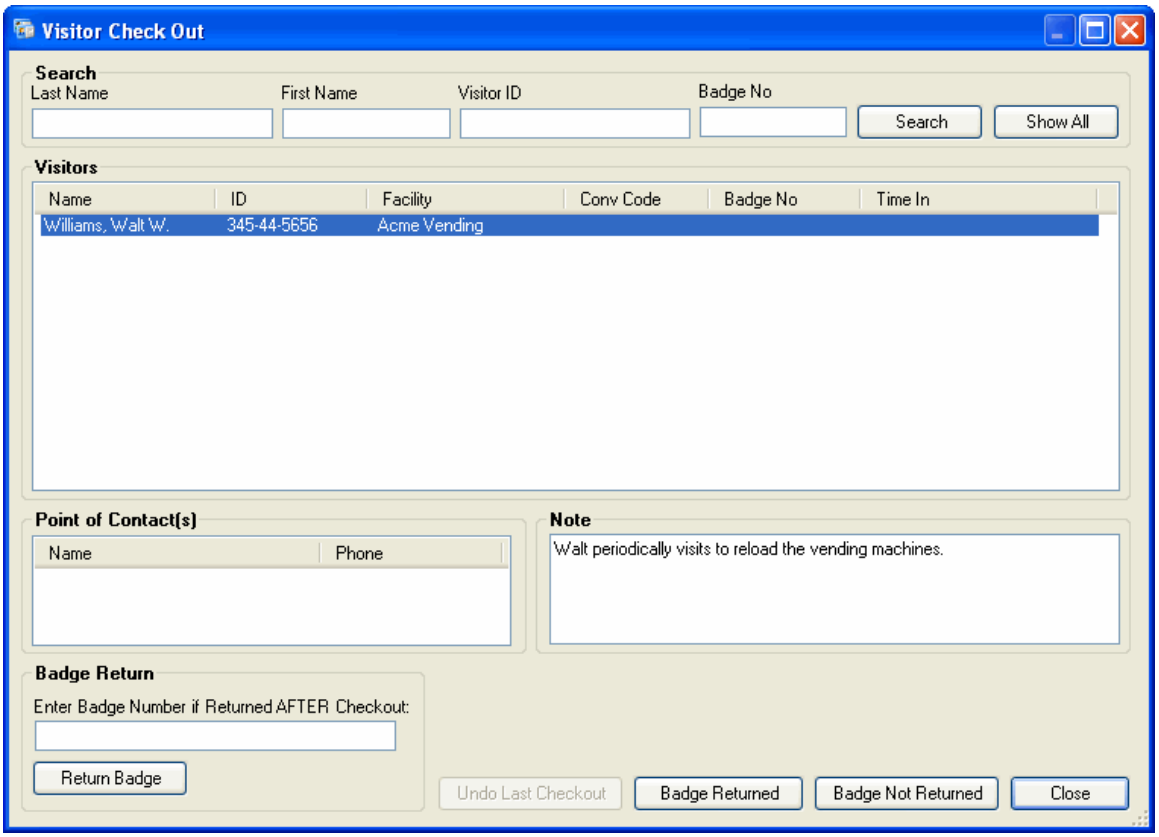
Field Name	Description

Last Name	To find a visitor by Last name, enter in part of the last name and %. And then choose the Search button. For example, if you entered "S%" then anyone whose last name begins with "S" will be listed below.
First Name	To find a visitor by First name, enter in part of the last name and %. And then choose the Search button. For example, if you entered "S%" then anyone whose last name begins with "S" will be listed below.
Visitor ID	To find a visitor by Visitor ID, enter it and then choose the Search button.
Visitor SSN	To find a visitor by Visitor SSN, enter it and then choose the Search button.
Active Only	Show all active Visitors in the list.
Search	Select this button to perform the search.
Advanced Search	To find all visitors by other fields not listed on the Check In screen, press Advanced Search to access more search fields.
Visitor List	This shows the list of Visitors based on any search criteria you entered in the Find Visitor By...box. or the Show All Active button.
Type of ID	The type of Identification used by the Visitor to prove his or her identity.
ID	To find a visitor by ID (SSN), enter it and press tab.
Citizenship	Displays the country of citizenship of the selected Visitor's record.
Non-Citizen Type	Displays non-citizen type such as US Citizen, Dual Citizenship, US Person or Foreign Person.
Clearance	Displays the clearance level of the selected Visitor from the Visitor's record.
Photo	Displays a picture of the Visitor from the Visitor's record if this option is turned on in the System Customization settings.
Point of Contacts	Displays the point of contact(s) for the selected visitor for the selected Visit Authorization record.

Purpose	Displays the purpose for the selected visitor for the selected Visit Authorization record.
Note	Displays the notes for the selected visitor for the selected Visit Authorization record.
Register Visitor	Displays a new screen to fill out when registering an arriving visitor.

Visitors Check Out

The Visitor Check Out screen is accessed by selecting **Check Out** from the Transactions menu. Use this screen to process/check out visitors that are leaving your site and returning a badge.



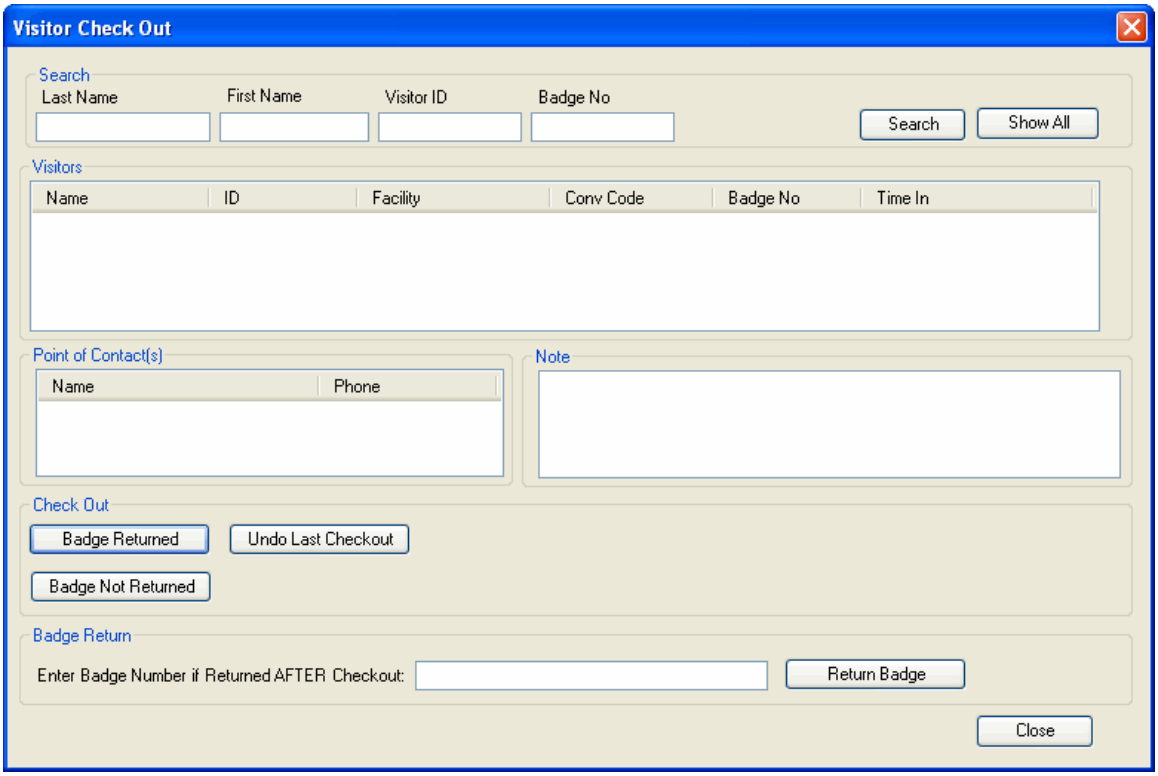
For more information about using this screen, see Input screen.

Visitors Check Out Page Fields

Field Name	Description
Last Name	Search the list of checked in visitors by Last Name
First Name	Search the list of checked in visitors by First Name.

Visitor ID	Search the list of checked in visitors by Visitor ID.
Badge No.	Search the list of checked in visitors list by Badge #.
Show All	Display all checked in visitors.
Point of Contacts	Once you select a visitor, the Point of Contact(s) Name and Phone will be listed below the visitor list if available.
Note	Enter any remarks to go with the visitor's visit record on check out.
Badge Returned	Once you select a visitor to check out, you can click Badge Returned if a badge was returned. The visitor's visit record will be updated with the time/date of check out and that the badge was returned.
Badge not Returned	If the visitor does not have his badge at the time of check out, you can click on Badge not Returned. This will still record the fact he or she left, but will show the badge was not returned. If the badge is returned by someone later, you can come back to this screen and record it later. See the next field below.
Enter Badge # if Returned AFTER Check Out	If a visitor was checked out without returning his or her badge, you can come back later and enter the badge number in this field. This will update the visit record with the Badge Returned check box.

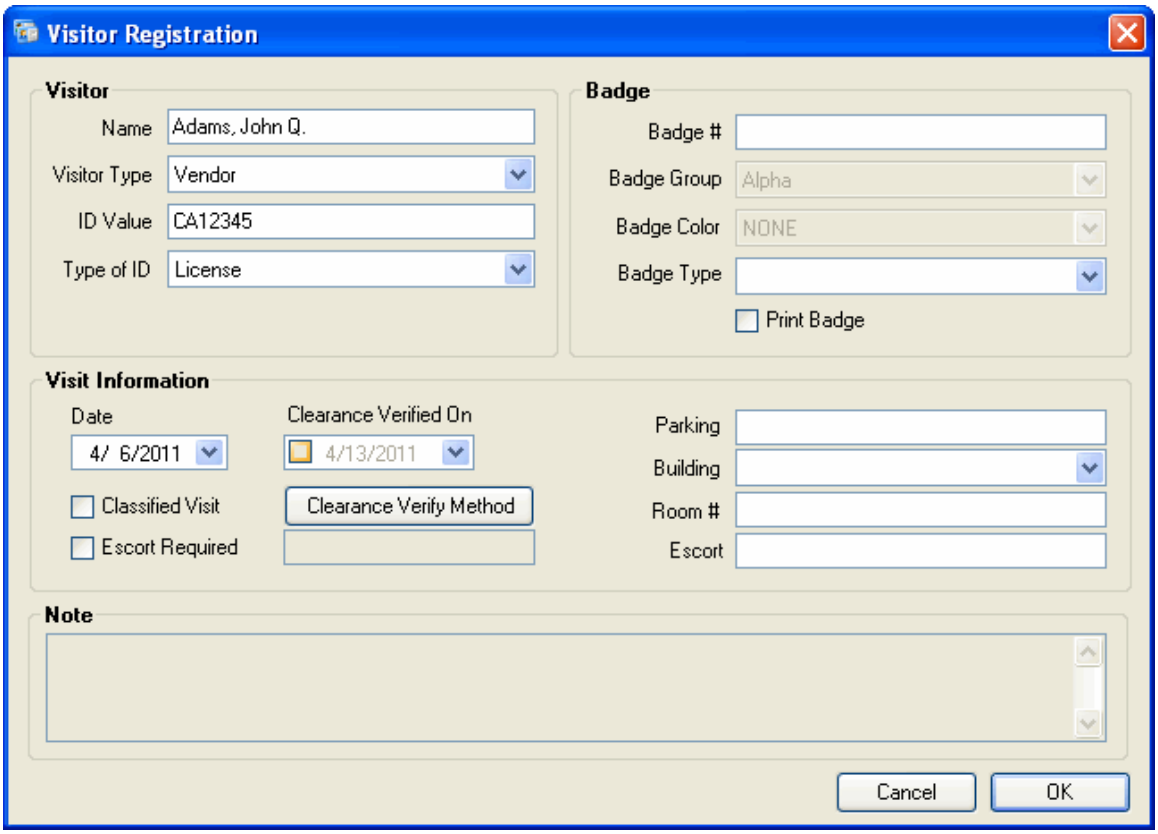
If you make a mistake and accidentally check out the wrong person, you have a chance to undo the change. Once you click **Badge Returned** or **Badge not Returned**, the screen will look like this.



The **Undo Last Check Out** button will undo the last checkout.

Visitor Registration

The Visitor Registration screen allows you to enter specific information for the visitor when he or she is checked in.



For more information about using this screen, see Input screen.

Visitor Registration Page Fields

Field Name	Description
Name	The name of the visitor.
Visitor Type	Visitor Type such as contractor, consultant, vendor, etc.
ID Value	ID used by the visitor to identify himself/herself.
Type of ID	ID such as Passport number or Driver's License number.
Badge #	Badge # if a badge is used.
Badge Group	Badge Group assigned from Visit Authorization.
Badge Color	Badge Color assigned from Visit Authorization.
Print Badge	If checked, a badge will be printed when OK is clicked.
Badge Type	Displays a list of Badge Types. By default, the SIMS built-in Visitor Badge report will display unless another type is selected in the list. Use the Custom Reports -> Report Overrides utility to add other custom badge types to this list. In the Report Override dialog, choose Visitor - Visitor Badges as the report name. Unlike other SIMS built-in reports, multiple custom visitor badges can be saved in the database, each with different Descriptions that will appear in this list.
Date	Date the visitor checks in. This is filled in automatically using the system date.
Classified Visit	Indicate if the visit is classified.
Escort Required	Indicate if an Escort is required. If selected, Escort Name can be specified. This value may be already be defaulted from the Visit Authorization.
Clearance Verified On	Indicates the date that clearance was verified.
Clearance Verified Method	Indicate how the visit clearance was verified.
Parking	Parking information
Building	Building to be visited, if applicable.

Room #	Room number to visited, if applicable.
Note	Any other remarks concerning this visitor's visit.

Visit Authorizations

Purpose of Visit Authorizations

Visit Authorization maintains information about the personnel who visit your facility.

The Visit Authorization module logs all incoming visit authorizations. Each visit authorization received from another facility should be entered into the Visit Authorization module. Each visitor on the Visit Authorization should be entered as a visitor with that authorization.

Visit Authorization

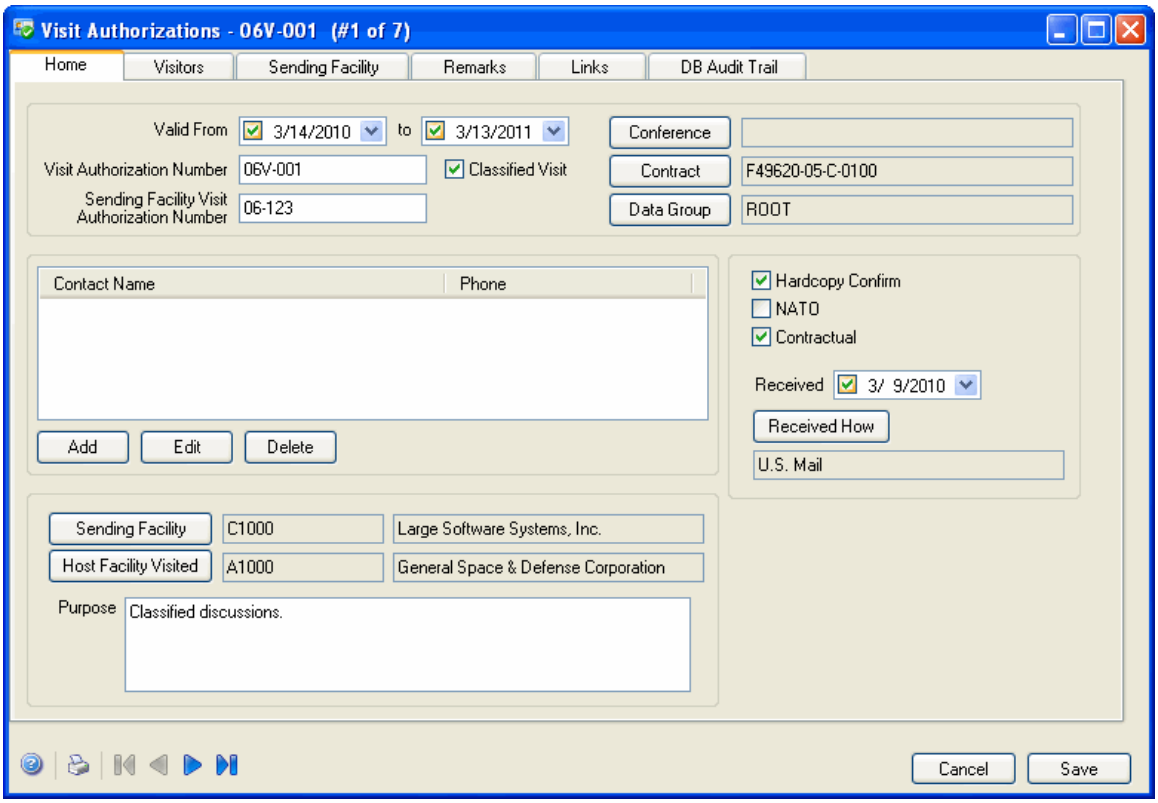
Input Screen Description
Home
Visitors
Sending Facility
Remarks
Links

List Screen Description
Default Output List

Reports
Reports

Visit Authorizations Input

Visit Authorizations Home



For more information about using this screen, see Input Screen.

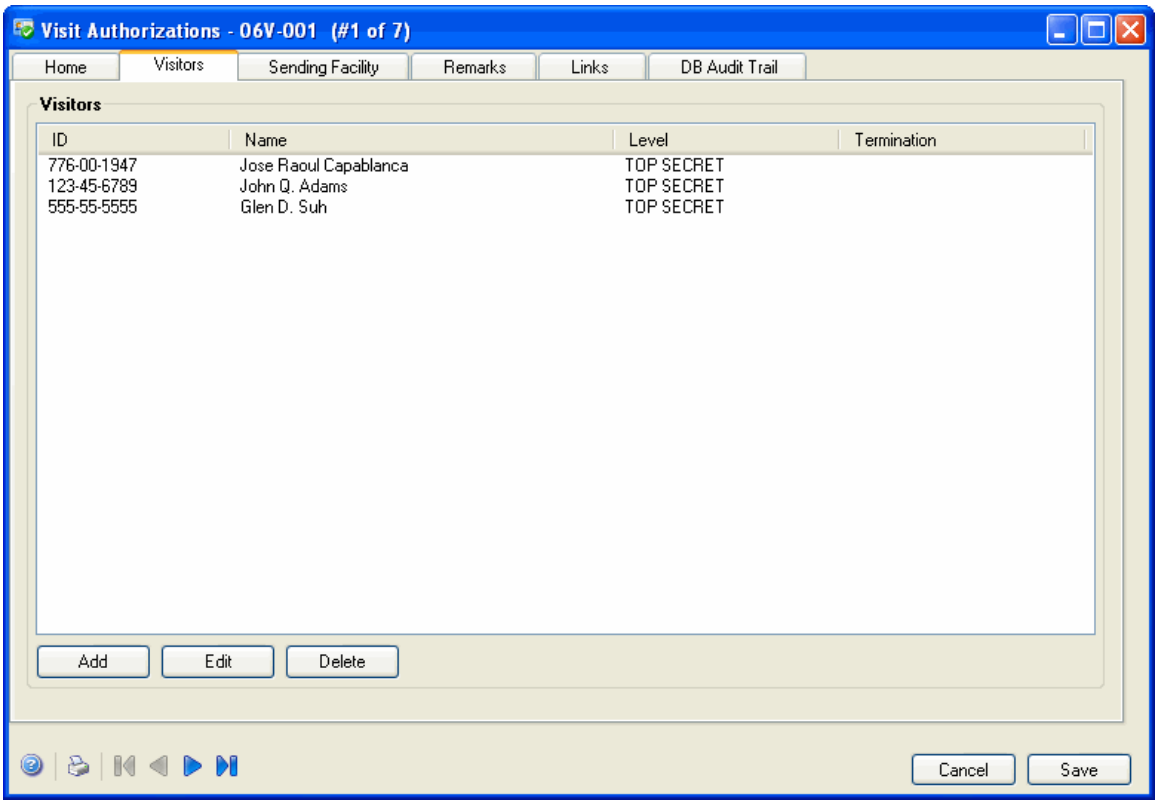
Visit Authorizations, Home Page Fields

Field Name	Description
Valid From	The visit authorization start date.
To	The visit authorization end date.
Classified Visit	Indicates a classified visit.
Visit Auth #	Auto-incrementing number that identifies the visit authorization record. See Utilities -> Auto Numbering.
Sending Fac. Visit Auth #	Authorization or request number on the Visit Authorization received (from Facility number).
Conference	Indicates the Visit Authorization conference or meeting. When a Visitor or Visit Authorization record that contains a reference to a Conferences record is saved, those visitors will not be automatically added to the referenced Conference record. See the topic Conferences Attendees which explains how to add pre-designated visitors to a conference record.
Contract	The contract ID.
Contact Name	The name for the point of contact(s) for the visitor
Phone	The phone for the point of contact(s) for the visitor
Hardcopy Confirm	Prints a confirmation of the Visit Authorization.
NATO	Indicates a NATO visit.
Contractual	Check this box if the visit request is contract related.
Data Group	The data group that the Visit Authorization belongs to. Data groups are defined in the User Management Data Groups dialog.
Received	The date that the visit request was received.
Received How	The way in which the visit request was received (e.g., U.S. mail, fax).

Sending Facility	The facility that is authorizing the visitor. Select the facility using a pick list. When adding visitors into the Visit Authorization record, the Sending Facility for each visitor record will automatically be assigned to the Sending Facility selected here. Once the Visit Authorization record is saved, the Sending Facility can be edited in the Visit Authorization record, but it will not automatically update the visitor record. This allows changes to be made to each visitor's From Facility field. See also Visitors Input - Home (From Facility).
Host Facility Visited	The host facility ID for the incoming visitor (which of your facilities the visitor is assigned to). If you have multiple host facilities, this allows you to query or filter visitors by facility.
Purpose	The purpose of the visit to the facility. When you create a Visitor in the Visit Authorization Module the text that is entered here is copied to the purpose field in the Visitor record. The purpose field is located on the 'Clearance' tab of the Visitor record. See the section below on Visit Authorization Visitors for information about the tab in which a visitor record can be added to the Visit Authorization record. The text for the Visit Authorization purpose field is copied and there is not an actual link with the Visitor's purpose field.

Visit Authorizations Visitors

When choosing the Add button, there is an input screen for visitor information. When that data is entered and when the visit authorization is saved, a visitor record will be created in the Visitors module. When selecting an existing visitor (i.e. by selecting the ID in the Add Visitor input screen), a duplicate visitor record will be created in the visitors module. This is done so that people can track visitors who might hold multiple clearances with different companies or for different contracts. If the visitor only needs to view secret material for a specific VAL under a specific contract, the visitor will only be allotted that information rather than potentially higher information.

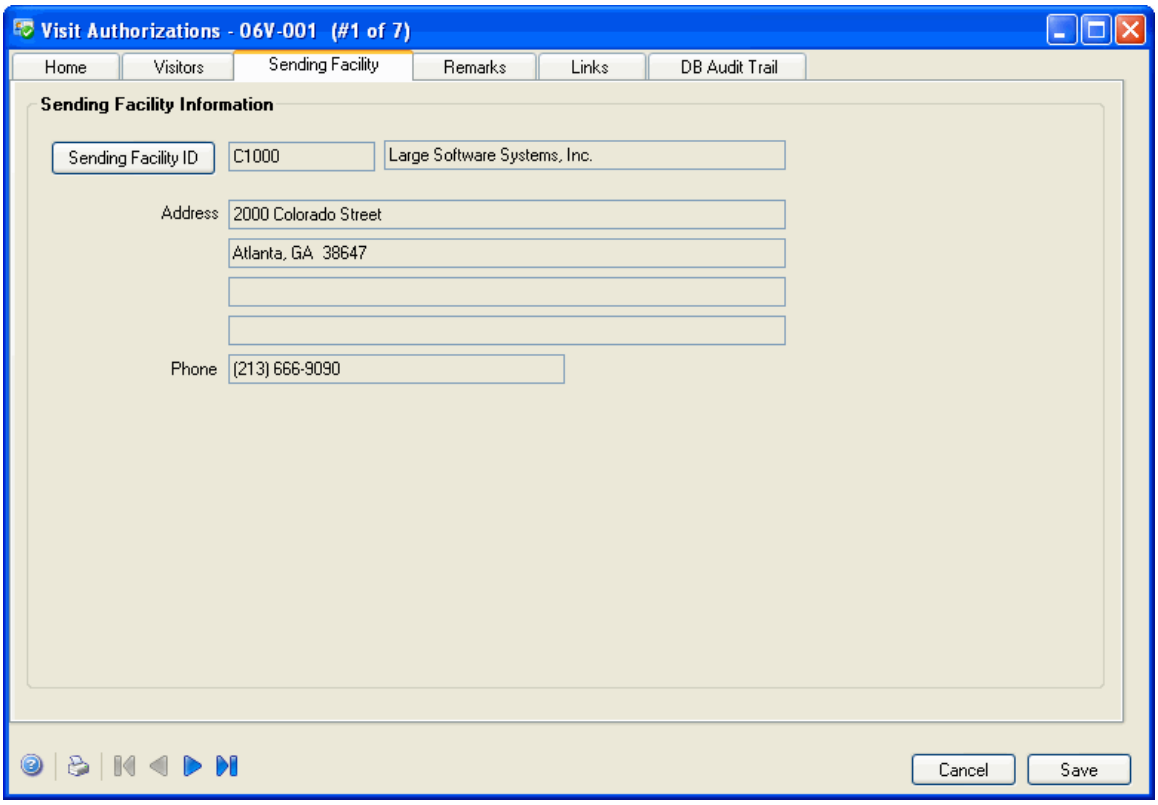


For more information about using this screen, see Input Screen.

Visit Authorizations, Visitors Page Fields

Field Name	Description
ID	ID or SSN of the visitor.
Name	Full name of the visitor.
Level	Clearance level of the visitor
Termination	Date the visitor's authorization will be terminated.

Visit Authorizations Sending Facility

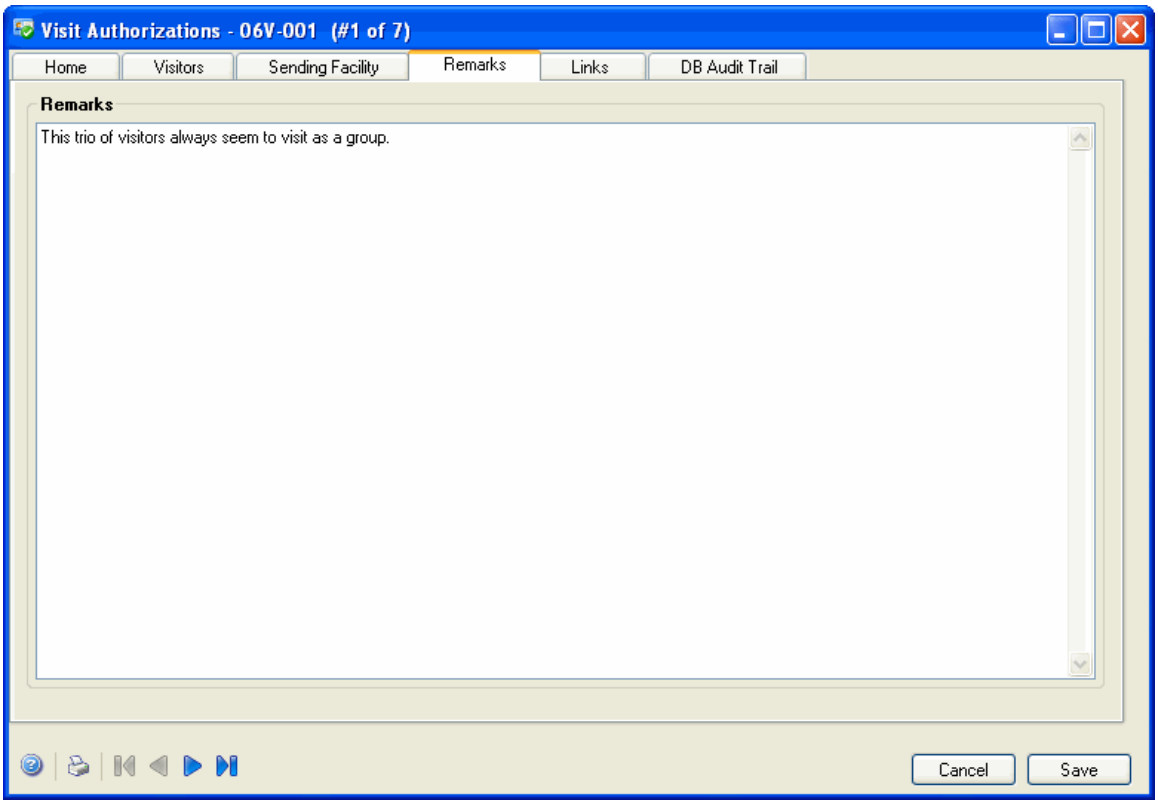


For more information about using this screen, see Input Screen.

Visit Authorizations, Sending Facility Page Fields

Field Name	Description
Sending Facility ID	Click to select the facility that the visitor is coming from.
Address	These fields fill in automatically when you select a facility.
Phone	The telephone number of the sending facility.

Visit Authorizations Remarks

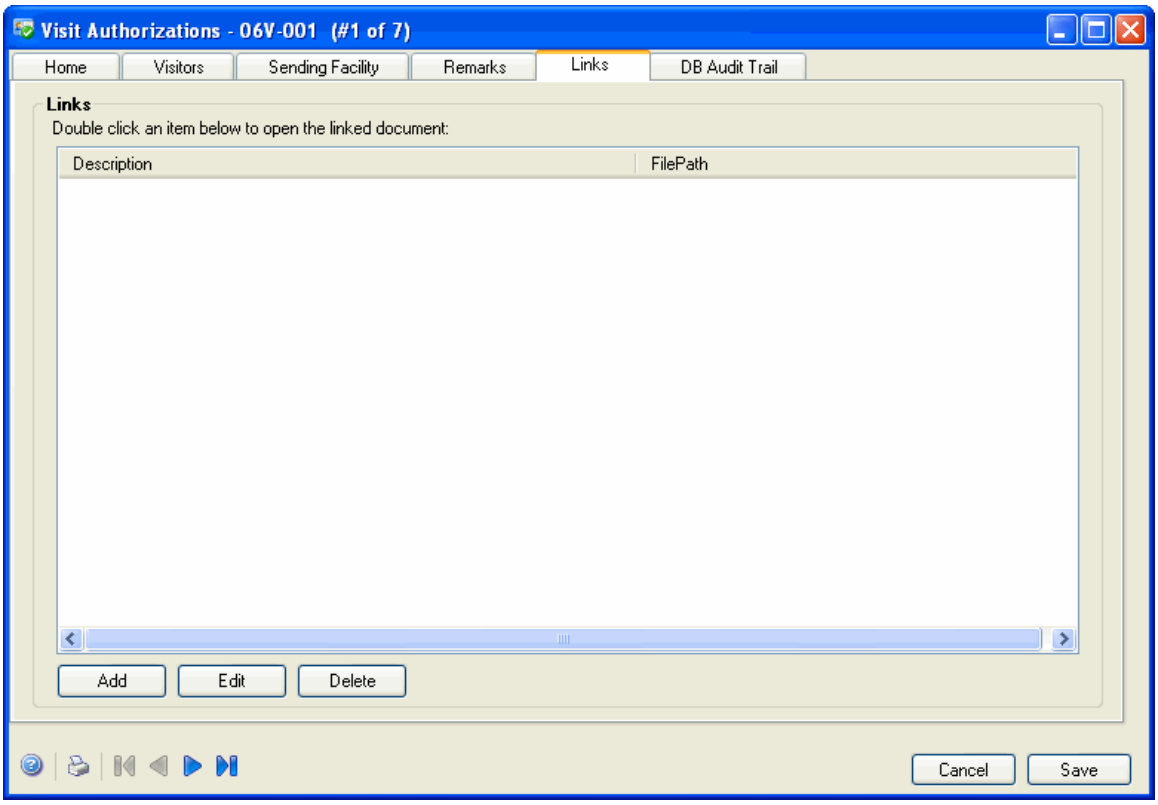


For more information about using this screen, see Input Screen.

Visit Authorizations, Remarks Page Fields

Field Name	Description
Remarks	Free-form textual information (up to 32k bytes of text).

Visit Authorizations Links



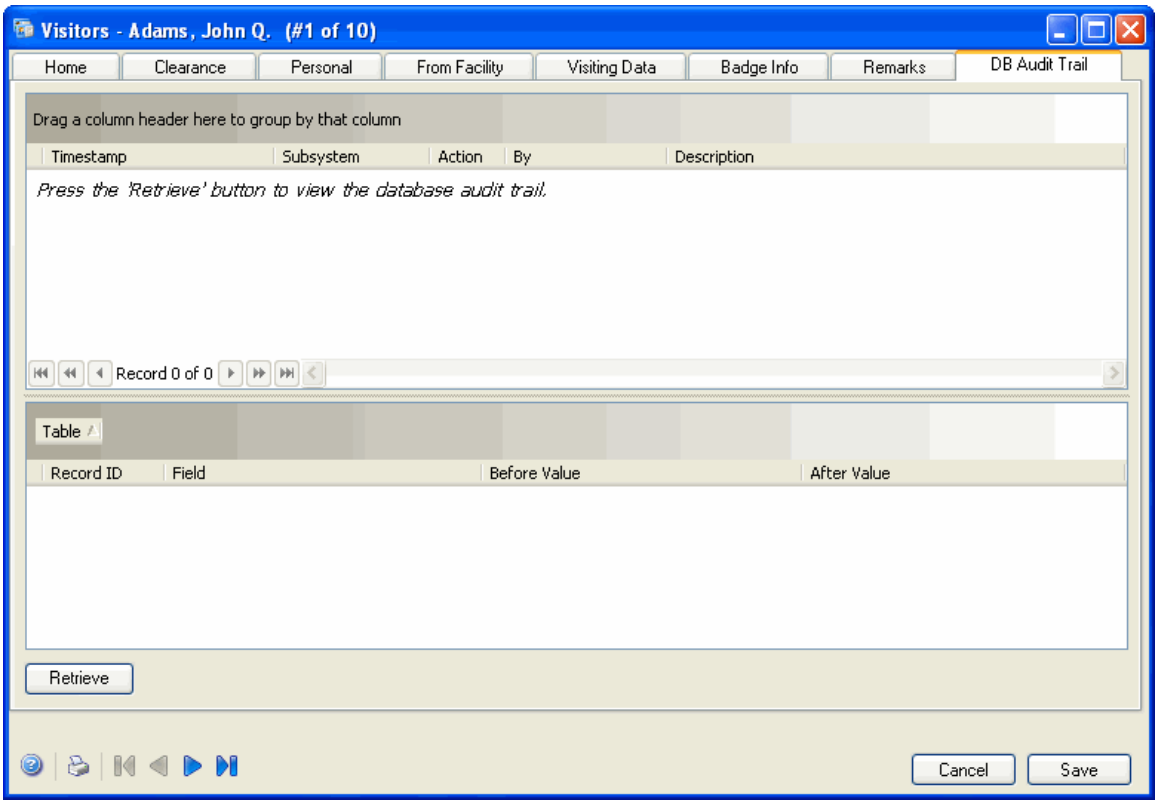
For more information about using this screen, see Input Screen.

Visit Authorizations, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Visit Authorizations DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Visit Authorizations, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

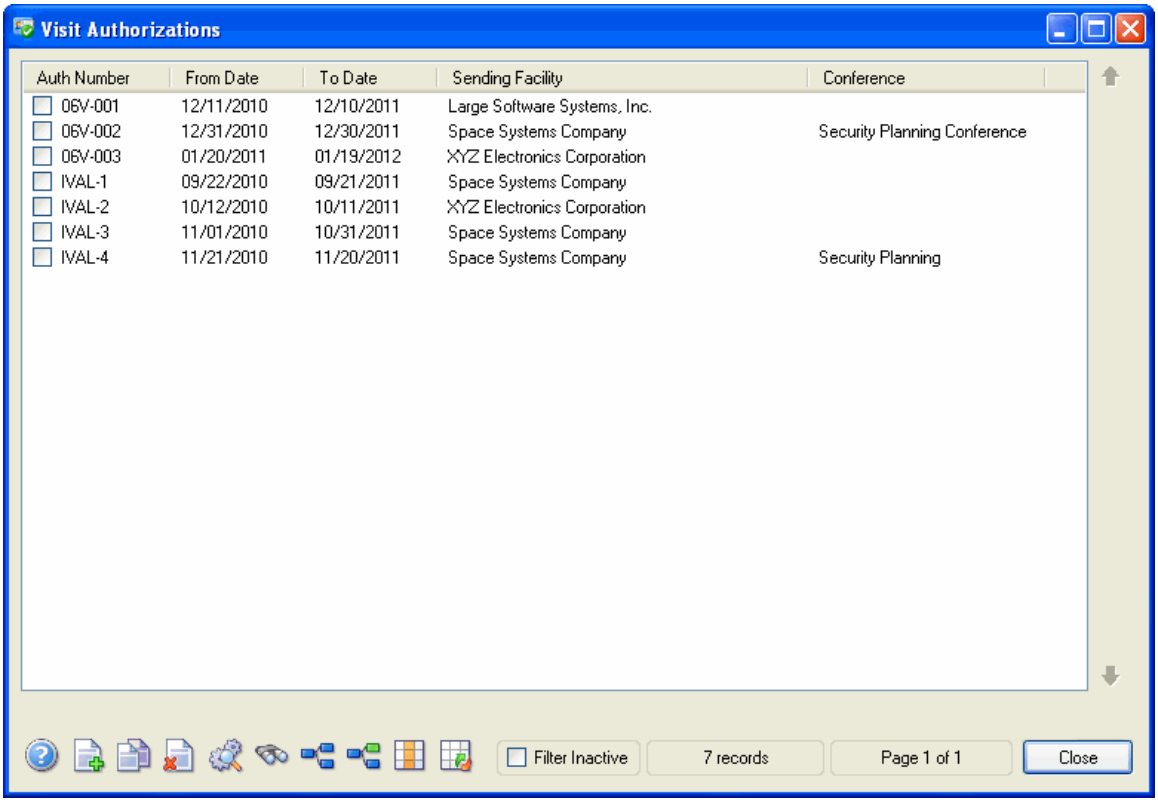
Visit Authorizations List

Default Output List

The Visit Authorizations default output list screen shows the Visitor Authorization Number, Received Date, From Date, To Date, and Facility Name for each record in the module.
You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.

- Double-click on a record to open an input screen where you can modify the fields.


Visit Authorizations
Auth Number
From Date
To Date
Sending Facility
Conference
06V-001 12/11/2010 12/10/2011 Large Software Systems, Inc.
06V-002 12/31/2010 12/30/2011 Space Systems Company Security Planning Conference
06V-003 01/20/2011 01/19/2012 XYZ Electronics Corporation
IVAL-1 09/22/2010 09/21/2011 Space Systems Company
IVAL-2 10/12/2010 10/11/2011 XYZ Electronics Corporation
IVAL-3 11/01/2010 10/31/2011 Space Systems Company
IVAL-4 11/21/2010 11/20/2011 Space Systems Company Security Planning
Filter Inactive
7 records
Page 1 of 1
Close

Filter Inactive
Check the **Filter Inactive** check box to prevent archived visit authorizations from appearing on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Visit Authorizations Reports

Reports Menu
For more information about the reports that appear in this module, see Standard Reports.

Forms

Purpose of the Program Access Request

The Program Access Request form is a database for filling out and printing the SAP Format 1-JAFAN "Program Access Request" form.

The Program Access Request has no relation or verification with the other databases. It is strictly a means to fill out the form. Data can be selected via picklists from Personnel and Facilities. Please contact SIMS Software for any additional information.

The form can be printed, looking almost identical to the May 2006 release of the form.

Information Systems (IS)

Purpose of IS

IS maintains information for systems that process classified information at your facility.

The Information Systems (IS) module maintains information on all systems within the facility that are approved for processing classified information. An Information System could be a computer, a word processor, or any approved IS device. Among the items included in the Information Systems module are the system ID, the classification level when processing and not processing, the system custodian and the dates of the last SPP approval and the next scheduled SPP review.

Information in the IS module is not used by any other SIMS module.

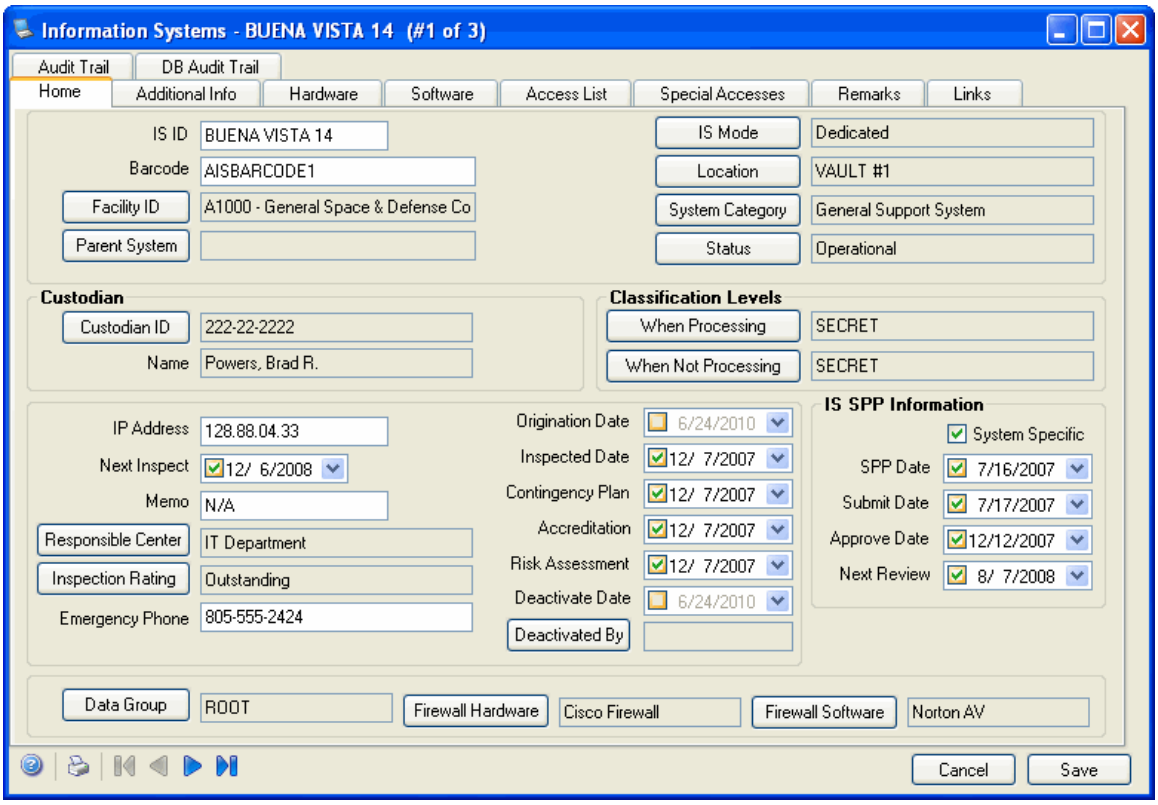
Input Screen Description
Home
Hardware
Software
Access List
Special Access
Remarks
Links

List Screen Description
Default Output List

Reports
Reports

IS Input

IS Home



For more information about using this screen, see Input Screen.

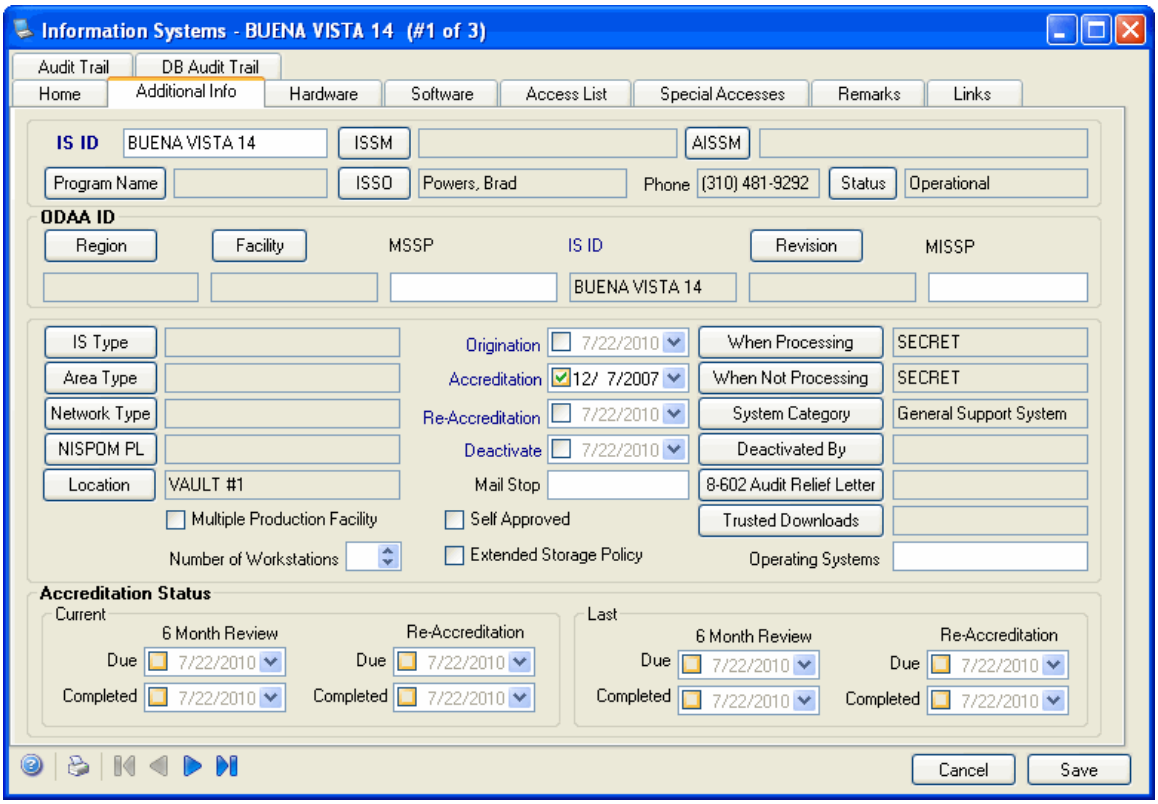
IS, Home Page Fields

Field Name	Description
IS ID	Any character and/or numerical string can be used for the ID.
Barcode	The Barcode field can be entered manually, via the keyboard, or scanned in, using a barcode reader connected through a serial port.
Facility ID	The system's host facility ID.
Parent ID	If this element is part of a larger system, you can enter the System ID for the larger or "parent" system.
Deactivate Date	This field contains the date that the system was deactivated and no longer approved for processing classified information.
Location	A specific location where the system can be found, such as a permanent office or column number, if in a very large room.

System Category	This field identifies each system as either a "major application " or a "general support system." Systems will be covered individually if they have been designated either as a major application or within the security plan of a general support system. **General Support System** is an interconnected information resource under the same direct management control that shares common functionality. It normally includes hardware, software, information, data, applications, communications, facilities, and people and provides support for a variety of users and/or applications. Individual applications support different mission-related functions. Users may be from the same or different organizations. **Major Application** is an application that requires special attention to security due to the risk and magnitude of the harm resulting from the loss, misuse, or unauthorized access to or modification of the information in the application. A breach in a major application might comprise many individual application programs and hardware, software, and telecommunications components. Major applications can be either a major software application or a combination of hardware/software where the only purpose of the system is to support a specific mission-related function.
Status	The life cycle management phase of the system.
IS Mode	The system mode.
Custodian ID	Click to select the person currently responsible for the system. This is a required field.
Custodian Name	The name of the selected person currently responsible for the system.
Class Level When Processing	The system classification when processing.
Class Level When Not Processing	The system classification when not processing.
IP Address	TCP/IP address of the system.
Next Inspect	Date when you have scheduled the next inspection of the facility/user.
Memo	MOA/MOU: Memorandum of Understanding. This field is used to indicate a second controlling office.
Responsible Ctr.	The responsible agent for the system.

Inspect Rating	The rating from the last inspection.
Inspected Date	Date the facility/user was last inspected.
Contingency Plan	The date the contingency plan was developed or last updated for the major application or general support system.
Accreditation	The date the major application or general support system was authorized and approved to process in an operational environment. It is made on the basis of a certification by designated technical personnel that the system meets pre-specified technical requirements for achieving adequate system security.
Risk Assessment	The date for the contingency plan.
System Specific?	Select to indicate that this IS Standard Practices and Procedures (SPP) Information applies only to this system. If not selected, it applies to all IS Systems.
SPP Date	Select to modify the SPP date.
Submit Date	Select to modify the submitted SPP date.
Approve Date	Select to modify the approved SPP date.
Next Review	Select to modify the next SPP date.
Emergency Phone	The emergency phone number for the specified IS system user group.
Data Group	The data group that the IS record belongs to. Data groups are defined in the User Management Data Groups dialog.
Firewall Hardware	Description of the hardware used to build the firewall.
Firewall Software	Description of the software used to build the firewall.

IS Additional Info



For more information about using this screen, see Input Screen.

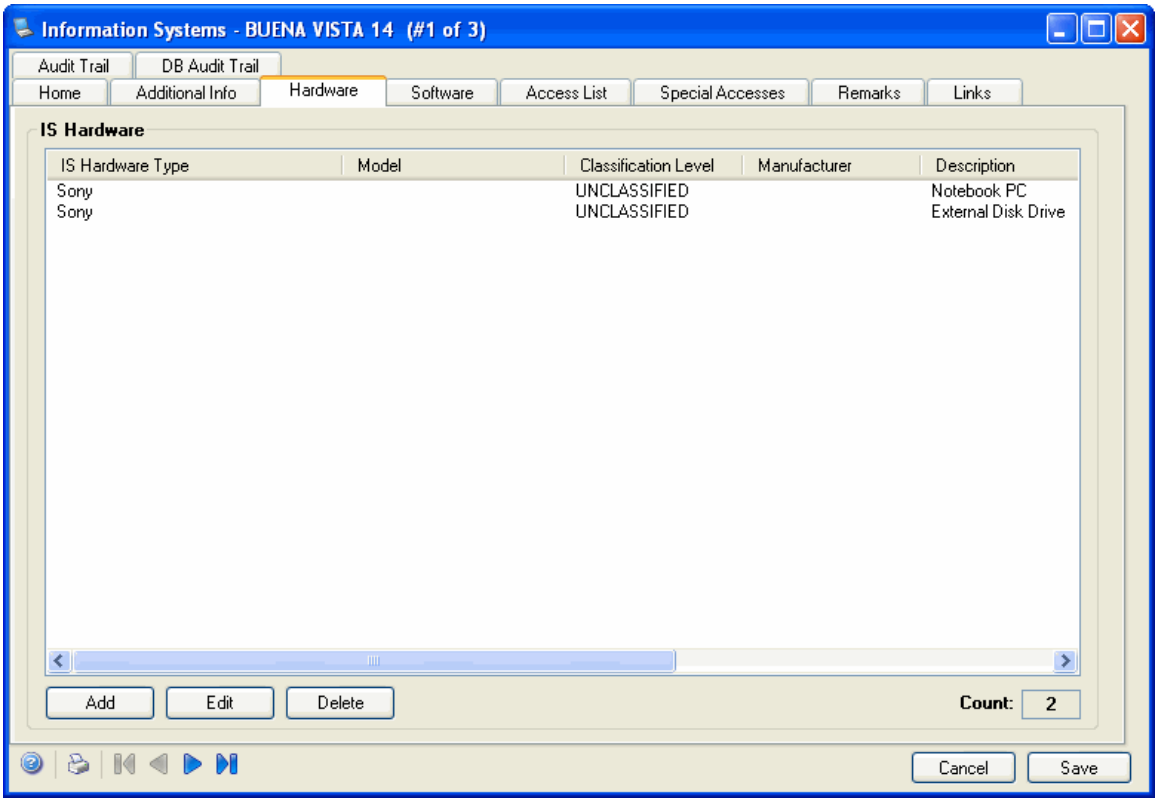
IS, Additional Page Fields

Field Name	Description
IS ID	Any character and/or numerical string can be used for the ID.
ISSM	Select the ISSM from the Personnel pick list.
AISSM	Select the AISSM from the Personnel pick list.
Program Name	Select the Program Name from a pick list.
ISSO	Select the ISSO from the Personnel pick list.
Status	Select the Status from a pick list.
Region	Select the Region from a pick list.
Facility	Select the Facility from the Facility pick list.
MSSP	Edit the MSSP.
Revision	Select the Revision from a pick list.
MISSP	Edit the MISSP.

IS Type	Select the IS Type from a pick list.
Origination	Edit the Origination date.
When Processing	Edit the When Processing date.
Area Type	Select the Area Type from a pick list.
Accreditation	Select the Accreditation from a pick list.
When Not Processing	Select the When Not Processing from a pick list.
Network Type	Select the Network Type from a pick list.
Reaccreditation	Select the Reaccreditation from a pick list.
System Category	Select the System Category from a pick list.
NISPOM PL	Select the NISPOM PL from a pick list.
Deactivate	Select the Deactivate date from a pick list.
Deactivated By	Select the Deactivated By person from a pick list.
Location	Select the Location from a pick list.
Mail Stop	Edit the Mail Stop field.
8-602 Audit Relief Letter	Select the 8-602 Audit Relief Letter from a pick list.
Multiple Production Facility	Check or uncheck the Multiple Production Facility field.
Self Approved	Check or uncheck the Self Approved field.
Trusted Downloads	Select the Trusted Downloads from a pick list.
Number of Workstations	Edit the number of workstations.
Extended Storage Policy	Check or uncheck the Extended Storage Policy field.
Operating Systems	Edit the Operating Systems field.
Current 6 month Review Due Date	Edit the date for the current 6 month Review Due Date.
Current 6 month Review Completed Date	Edit the date for the current 6 month Review Due Date.
Current Reaccreditation Due Date	Edit the date for the current Reaccreditation Due Date.

Current Reaccreditation Completed Date	Edit the date for the current Reaccreditation Completed Date.
Last 6 month Review Due Date	Edit the date for the last 6 month Review Due Date.
Last 6 month Review Completed Date	Edit the date for the last 6 month Review Completed Date.
Last Reaccreditation Due Date	Edit the date for the last Reaccreditation Due Date.
Last Reaccreditation Completed Date	Edit the date for the last Reaccreditation Completed Date.

IS Hardware



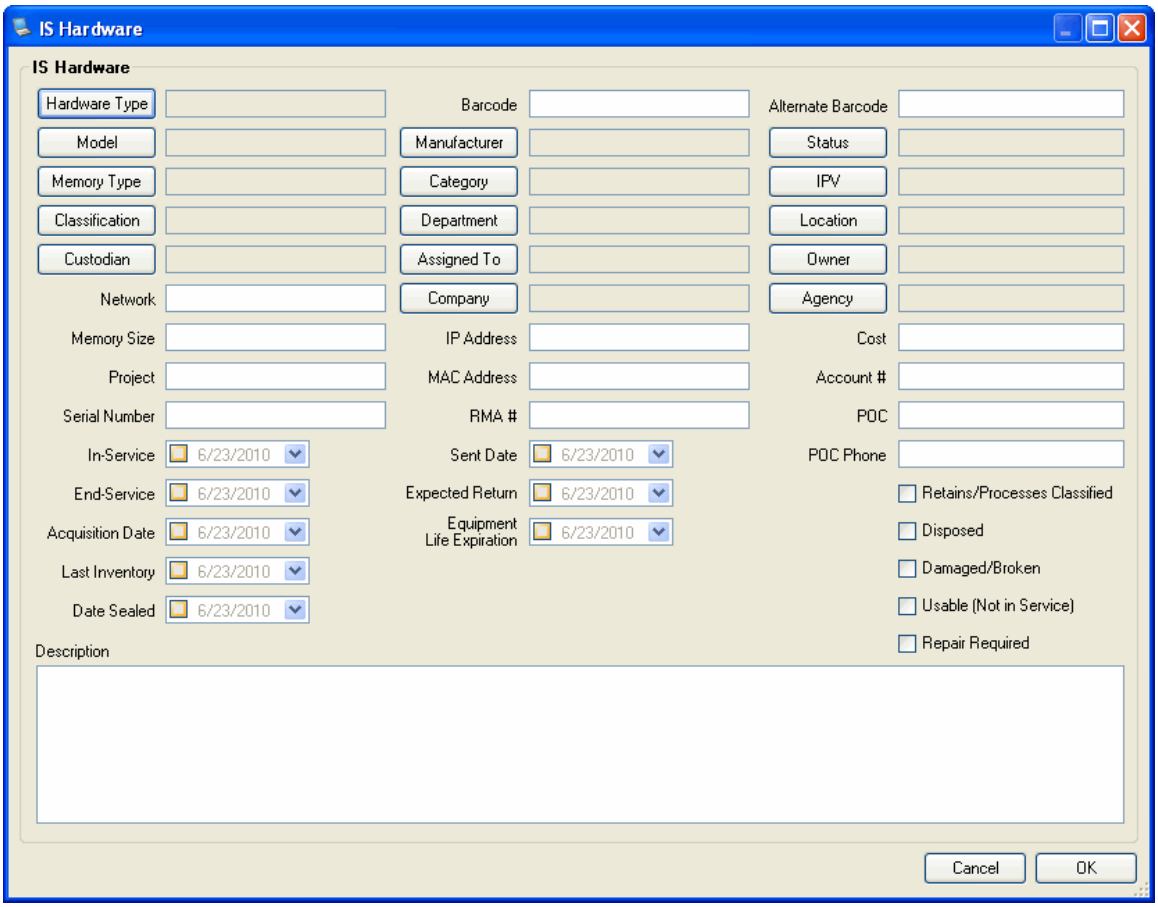
For more information about using this screen, see Input Screen.

IS, Hardware Page Fields

Field Name	**Description**
IS Hardware Type	The IS hardware type.
Model	The IS hardware model number.

Classification Level	Select hardware classification level.
Manufacturer	The manufacturer of the hardware.
Description	The description of the hardware.

If you want to add hardware, click **Add** and the following type of window will appear.



For more information about using this screen, see Input Screen.

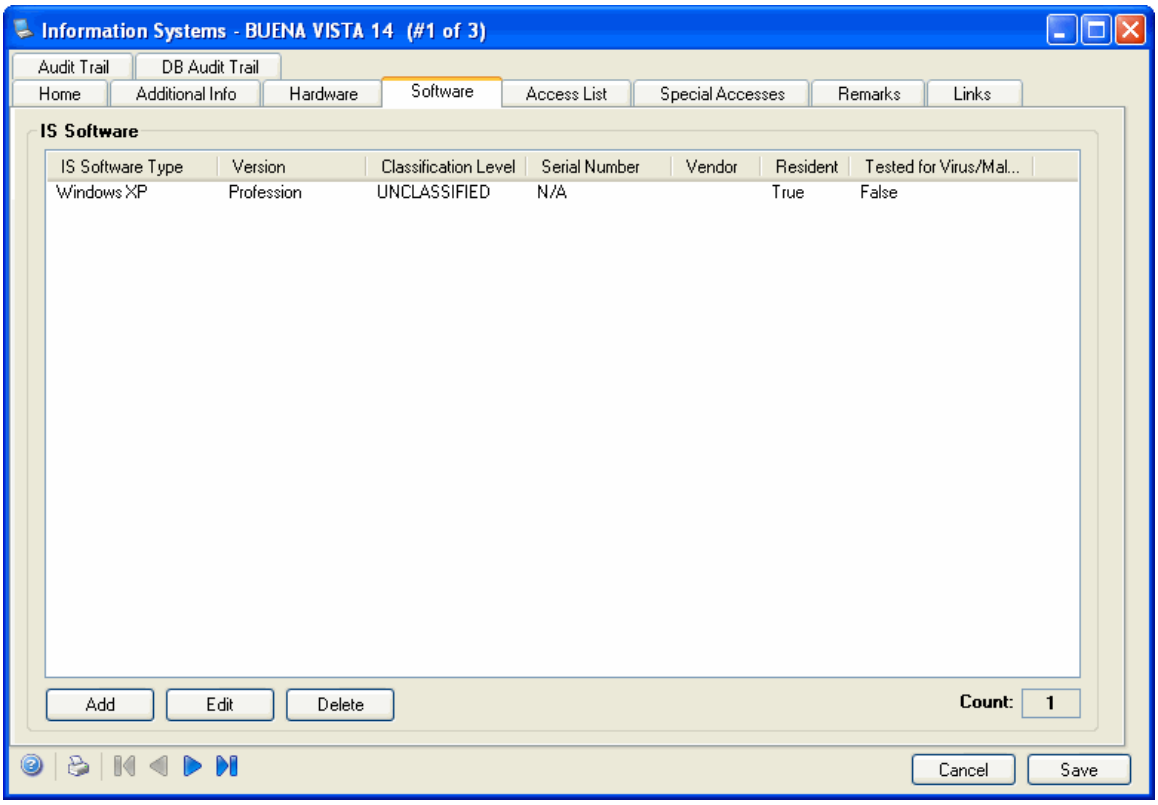
IS, Hardware Add Page Fields

Field Name	**Description**
Type	Select the IS hardware type.
Model	The IS hardware model number.
Memory Type	The memory type for the hardware.
Classification	Select the hardware classification.

Custodian	The custodian of the hardware.
Network	The network for the hardware.
Memory Size	The IS hardware memory size.
Project	The project for the hardware.
Serial Number	The IS hardware serial number.
In-Service	Select the in-service date.
End-Service	Select the end-service date.
Acquisition Date	Select the acquisition date.
Last Inventory	Select to modify the date the system was last inventoried.
Date Sealed	Select to modify the date the system was last sealed.
Barcode	Enter the barcode via the keyboard or scan it in with a barcode reader.
Manufacturer	Enter the IS hardware manufacturer.
Category	Select the IS hardware category.
Department	Select the IS hardware department.
Assigned To	Select the personnel or visitor record that the IS hardware is assigned to.
Company	Select from the facility pick list.
IP Address	Enter the IP Address.
MAC Address	Enter the MAC Address.
RMA #	Enter the RMA #.
Sent Date	Specify the sent date.
Expected Return	Specify the expected return date.
Equipment Life Expiration	Specify the equipment life expiration date.

Alternate Barcode	Specify an alternate barcode for the IS hardware.
Status	Select the status.
IPV	Select the IPV.
Location	Select the location.
Owner	Select the owner of the IS hardware.
Agency	Select the agency.
Cost	Enter the cost.
Account #	Enter the account number.
POC	Enter the point of contact.
POC Phone	Enter the point of contact phone number.
Retains/Processes Classified	Specify the retains/processes classified status.
Disposed	Specify the disposed status.
Damaged/Broken	Specify the damaged/broken status.
Usable (Not in Service	Specify if the hardware is usable.
Repair Required	Specify if a repair is required.
Description	Description or name of the system.

IS Software

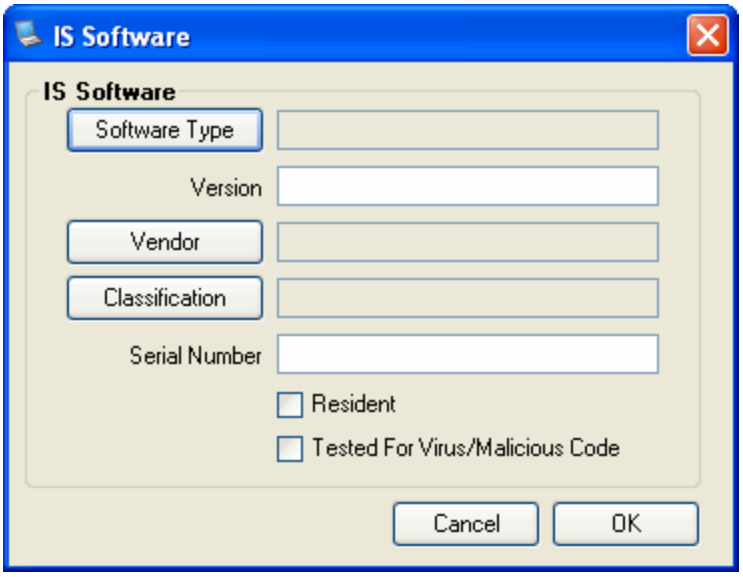


For more information about using this screen, see Input Screen.

IS, Software Page Fields

Field Name	Description
IS Software Type	Manufacturer or name of the software.
Version	Version of the software.
Classification Level	Classification of the software.
Serial Number	Serial number for the software.
Vendor	The number of items displayed in the AIS software list.
Resident	Select to indicate when the software is memory resident.
Tested for Virus/Malicious Code	Indicates if the software was tested for virus/malicious code.

To add software, click **Add** and the following dialog box opens.

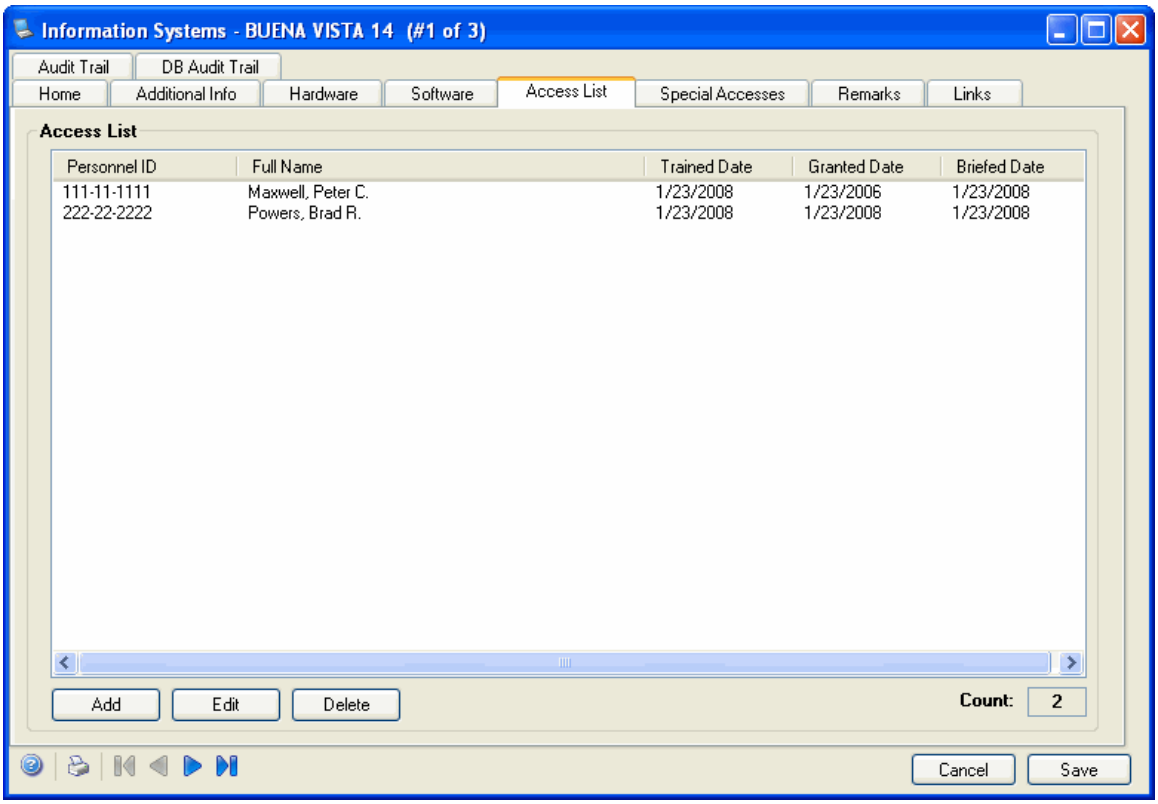


For more information about using this screen, see Input Screen.

IS, Software Add Page Fields

Field Name	Description
Type	Select the manufacturer or name of the software.
Version	Version of the software.
Classification	Select the classification of the software.
Serial Number	Serial number for the software.
Resident	Select to indicate when the software is memory resident.
Tested for Virus/Malicious Code	Select to indicate if the software was tested for virus/malicious code.

IS Access List

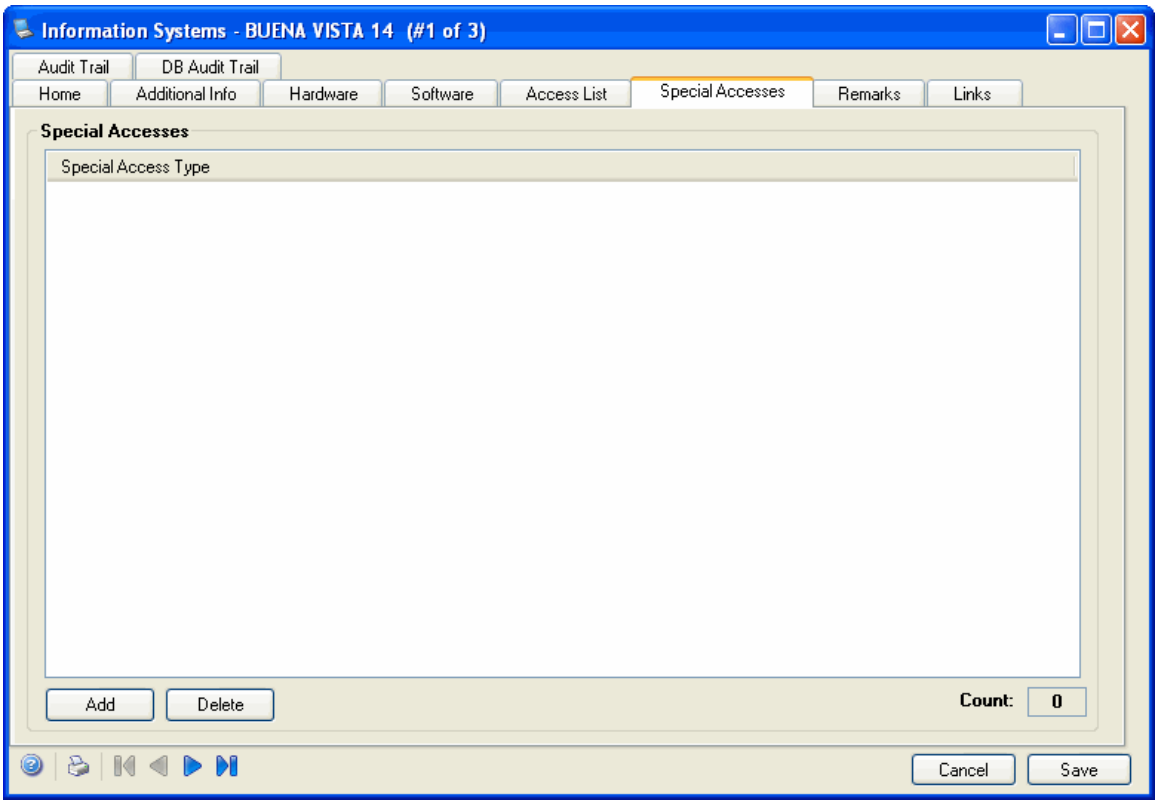


For more information about using this screen, see Input Screen.

IS, Access List Fields

Field Name	Description
Personnel ID	Person's identification number.
Full Name	Person's full name.
Trained Date	The person's trained date. This is modified when selecting the Add or Edit button.
Granted Date	The person's granted date. This is modified when selecting the Add or Edit button.
Briefed Date	The person's briefed date. This is modified when selecting the Add or Edit button.

IS Special Access

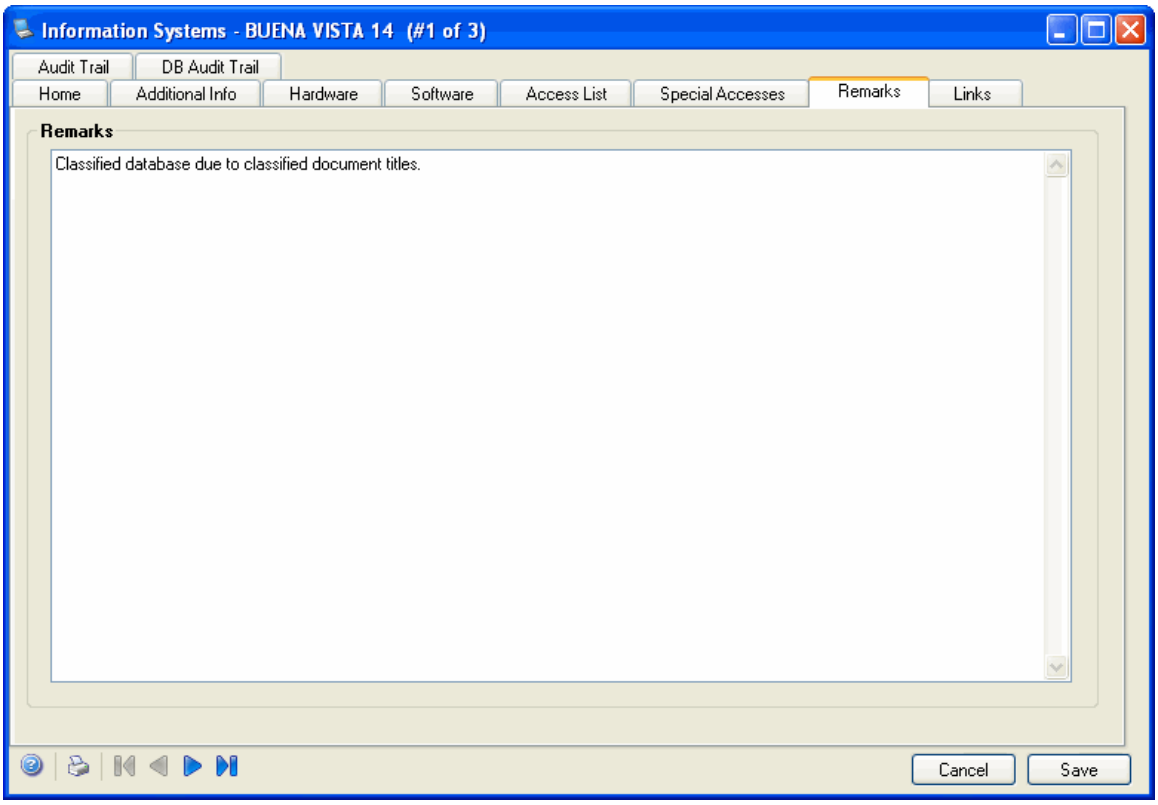


For more information about using this screen, see Input Screen.

IS, Access List Fields

Field Name	Description
Special Access Type	Type of special access.

IS Remarks

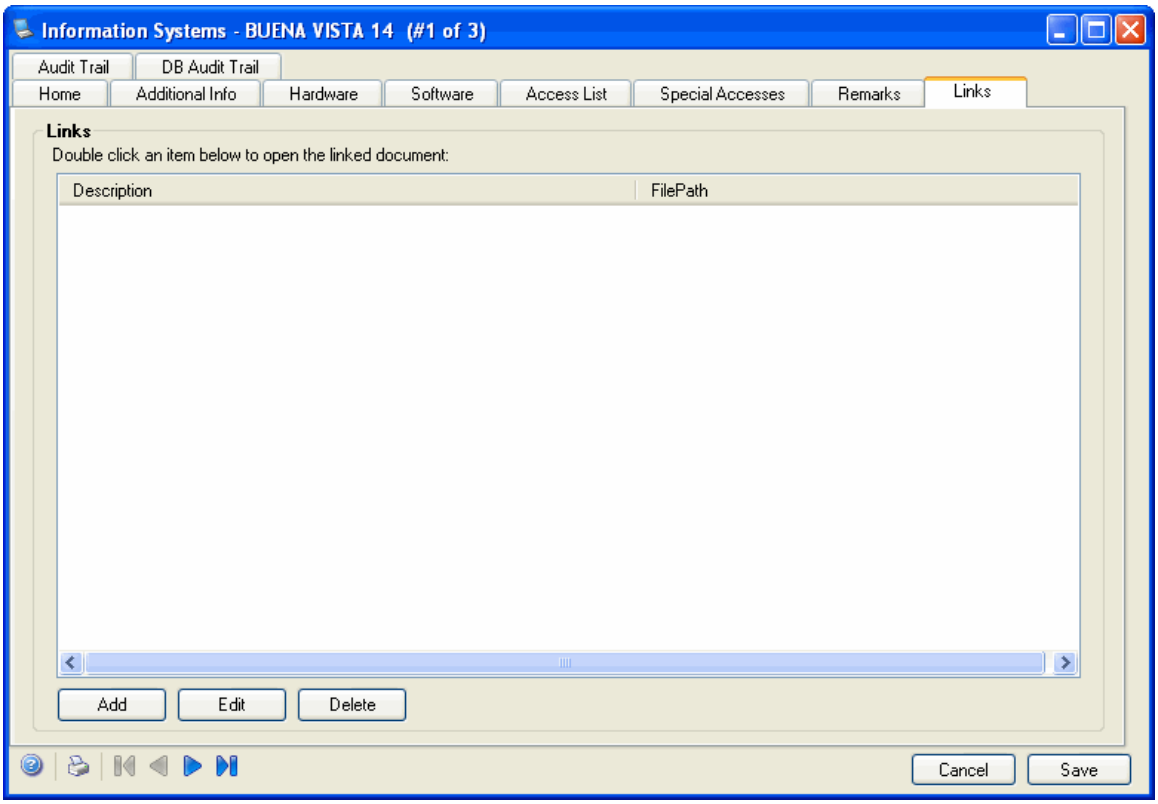


For more information about using this screen, see Input Screen.

IS, Remarks Page Fields

Field Name	Description
Remarks	Enter free-form textual information (up to 32k bytes of text).

IS Links



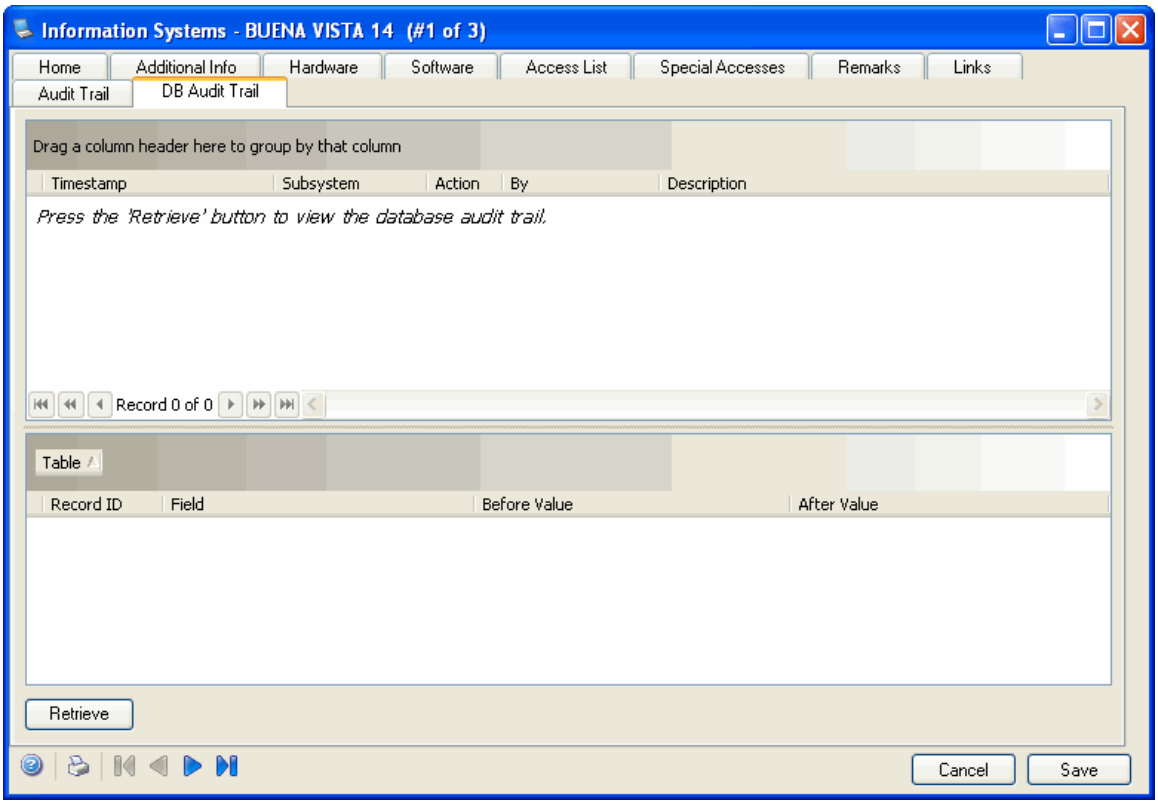
For more information about using this screen, see Input Screen.

IS, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

IS DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Information Systems, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

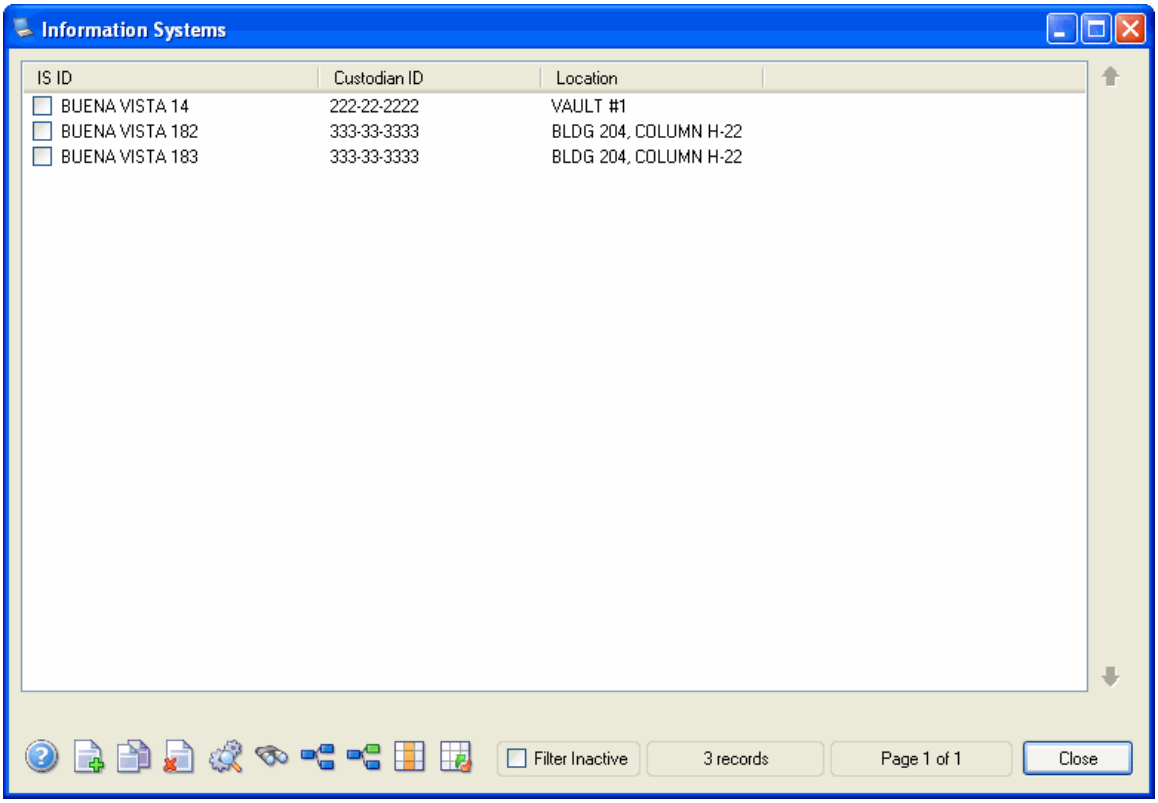
IS List

Default Output List Screen

The IS default output list screen shows the System ID, Custodian ID, and Location fields for each IS record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** check box to show archived IS records in this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

IS Reports

IS Reports

Reports Menu
For more information about the reports that appear in this module, see Standard Reports.

IS Transactions

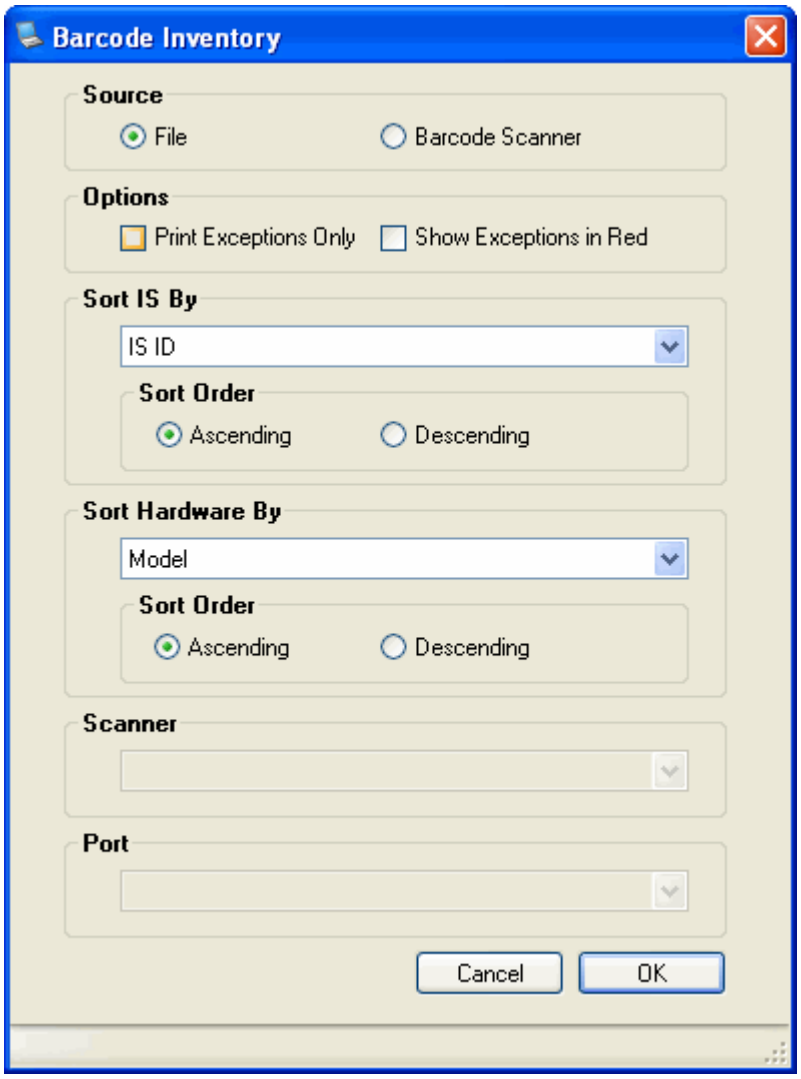
IS Barcodes

Inventory by Barcode Scanning Data
This report performs an inventory of all IS hardware assigned either to specific systems and provides the following information, based on the data downloaded from a portable barcode scanner.

Identification of the systems found and whether or not they coincide with those found in the IS database;
Identification of all hardware that was found with each system and whether it was found with the correct system, and

a listing of all missing hardware from each system scanned.

The user must choose the source of the downloaded barcode data, as shown below.



Select "File" if a file was previously downloaded and saved. If a leading period appears in the barcode inventory file, the period can be filtered by enabling an option in the System Customization IS tab. If the data was not previously downloaded and a scanner is being used, the user should select "Barcode Scanner" and they will then be prompted to download the file. See Barcode Scanning for additional instructions on how to scan barcode labels and download the barcode data.

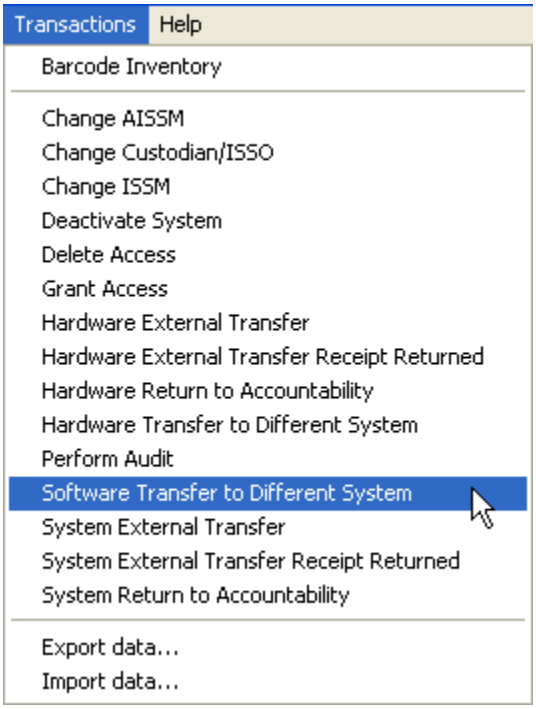
If the user checks "Print Exceptions Only", then only hardware that do not belong in the inventory or were not found will be printed. This can save a considerable amount of time and paper when printing the reports.

Select the serial port that the scanner is attached to if a scanner is being used.

After choosing the OK button, the program will confirm the number of barcodes received. The data is then processed and the report printed. Please be patient, as this inventory may take some time, depending on the size of the barcode file.

Other Transactions

The Transactions menu allows changes to be made to multiple AIS records. Select the transaction and in the transaction dialog, query for the records in which the transaction should be performed. An audit trail is kept on each transaction. Default values can be set for the IS transaction screens by going to Utilities -> Transaction Defaults.



Conferences & Meetings

Purpose of Conferences & Meetings

Conferences & Meetings maintains information for events attended at your facility.

The Conferences & Meetings module tracks scheduled events. It can track incoming visitors and in-house personnel expected to attend the event, points of contact for the event, and the associated classification level of topics

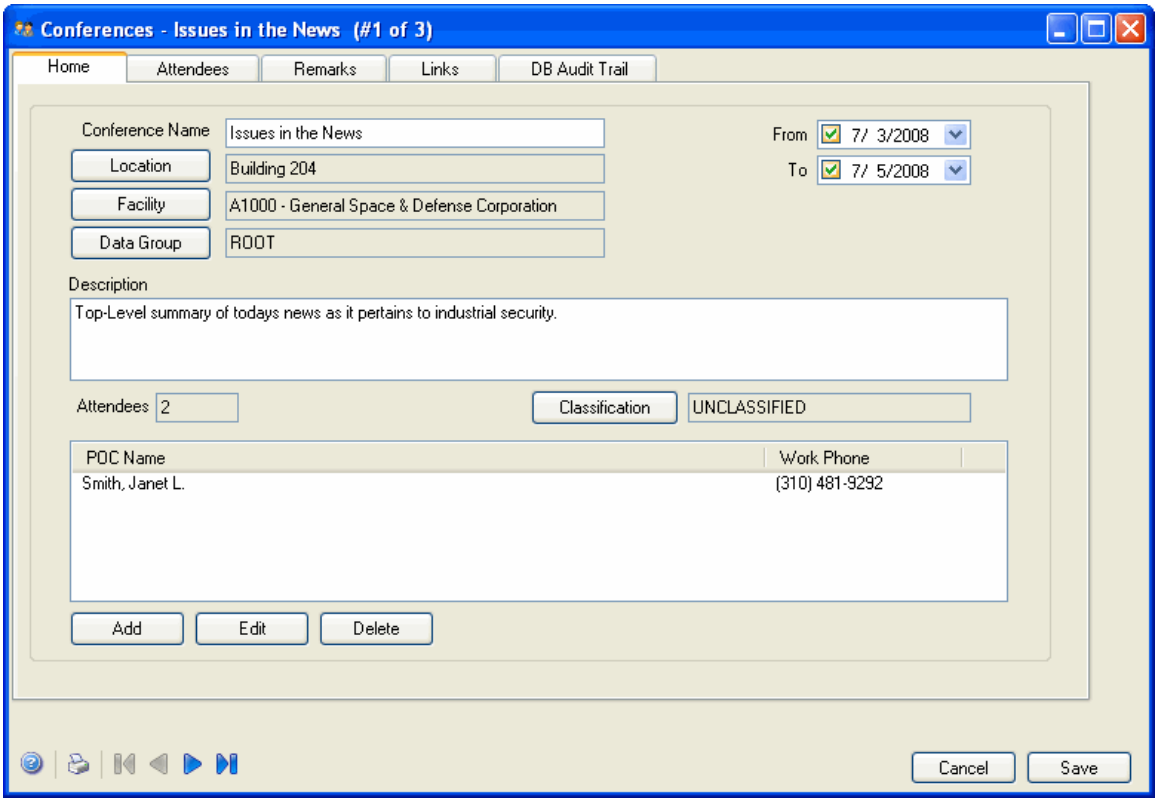
Input Screen Description
Home
Attendees
Remarks
Links

List Screen Description
Default Output List

Reports
Reports

Conferences Input

Conferences Home

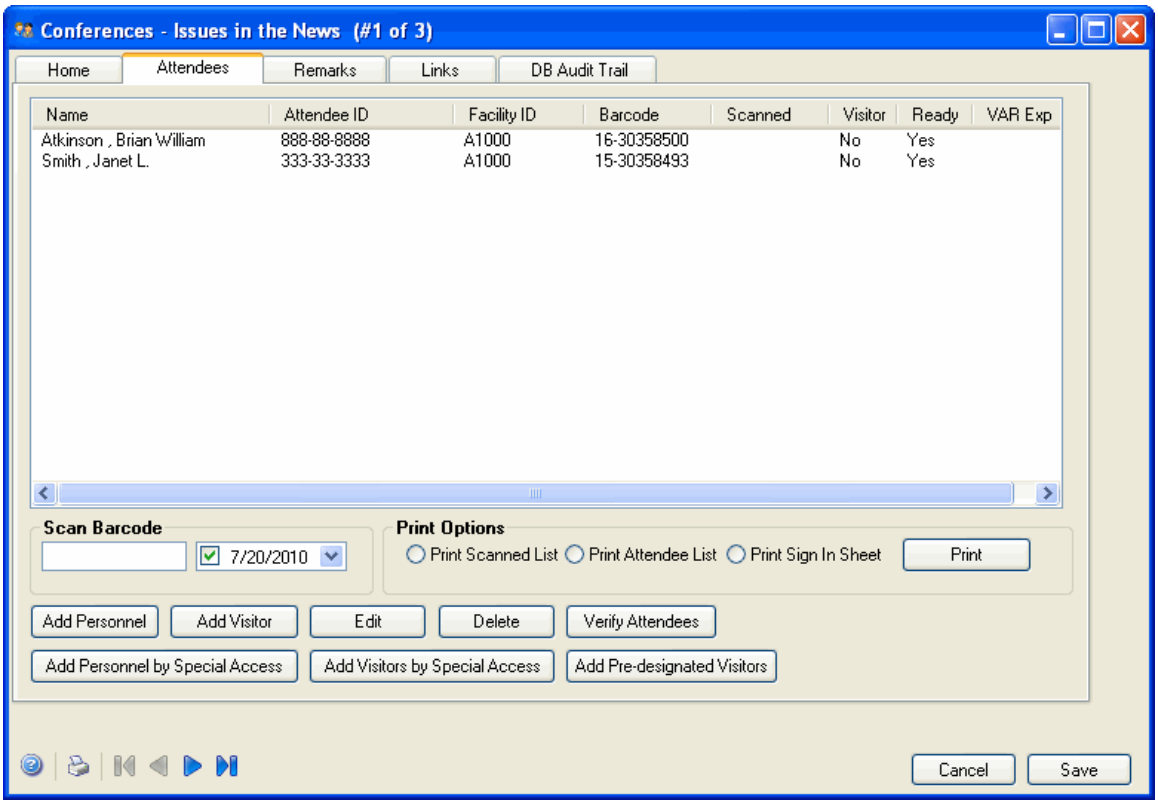


For more information about using this screen, see Input Screen.
Conferences, Home Page Fields

Field Name	Description

Conference Name	Name or a brief description of the conference.
Conference Location	The location where the conference will be held.
From	The conference start date.
To	The conference end date.
Facility	Choose the Facility button to select a Facility related to the Conference.
Data Group	The data group that the Conference belongs to. Data groups are defined in the User Management Data Groups dialog.
Description	Description of the conference or meeting.
Attendees	Number of people attending the conference. Detailed attendee information is found on the Attendee tab.
Classification Level	The conference's classification level.
POC Name	The names of the Points of Contact (POCs) for the conference.
Work Phone	The work phone numbers of the Points of Contact (POCs) for the conference.

Conferences Attendees



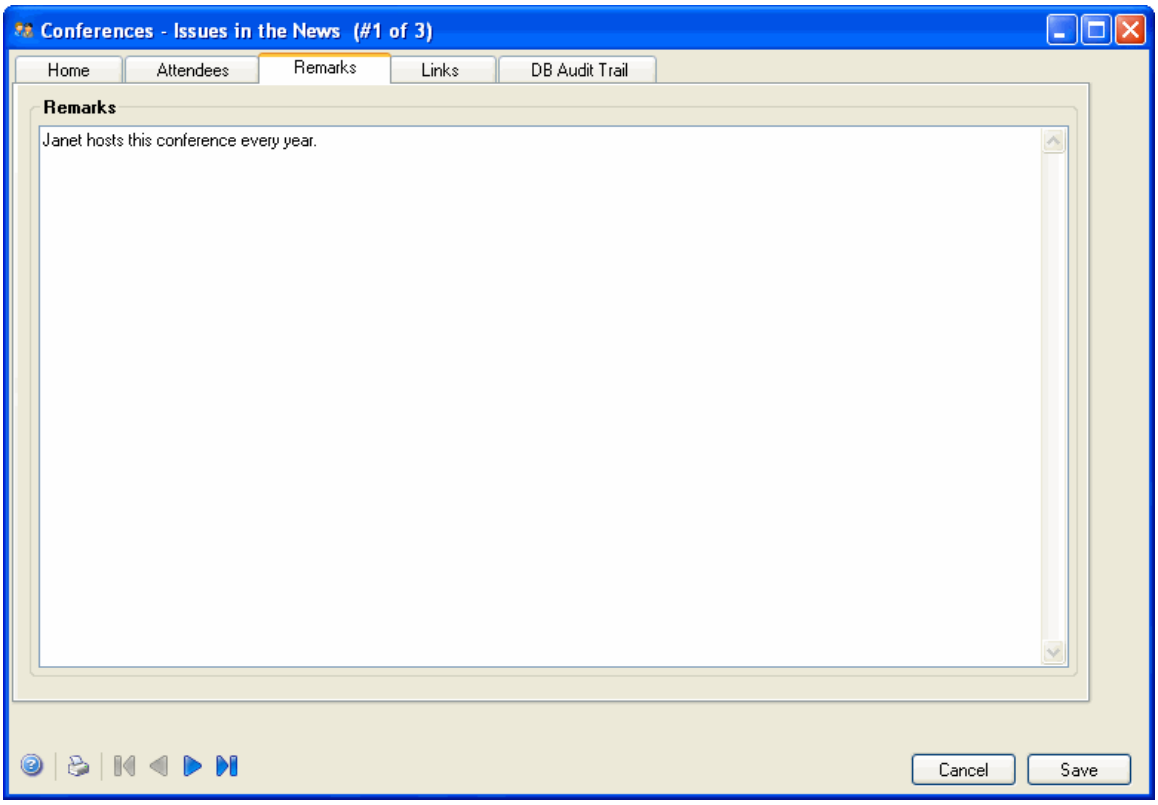
For more information about using this screen, see Input Screen.

Conferences, Attendees Page Fields

Field Name	Description
List of Attendees	The list of conference attendees.
Scan Barcode	To confirm the arrival of an attendee, scan their barcode from the Printed Attendees list or type in their barcode or badge number. A date appears in the Scanned column and the attendee's row turns green.
Scan Date	Date of scan. Defaults to current date, but can be overwritten to backdate scans.
Print Options	Select option to print a Scanned List, Attendee List, or Sign In Sheet.
Print	Select to print the specified Print Option.
Add Personnel	Click this button to add an employee to the list of attendees.
Add Visitor	Click this button to add a visitor from the Incoming Visitor module to the list of attendees.

Verify Attendees	Click this button to check the Visitor Authorization module for the correct time frame and correct clearance level for that conference.
Add Personnel by Special Access	Click this button to select from a list of Special Accesses. Using the radio button options in the dialog, specify if any or all Special Accesses are required. Each personnel record that meets the selected Special Access requirements will get added as to the list of attendees. A confirmation message will appear before the records are added.
Add Visitors by Special Access	Click this button to select from a list of Special Accesses. Using the radio button options in the dialog, specify if any or all Special Accesses are required. Each visitor record that meets the selected Special Access requirements will get added as to the list of attendees. A confirmation message will appear before the records are added.
Add Pre-designated Visitors	When a Visitor or Visit Authorization record that contains a reference to a Conferences record is saved, those visitors will not be automatically added to the referenced Conference record. When this button is clicked, all Visitor records are scanned to locate those Visitor records that have that particular Conference record selected. For those Visitor records that do, the Visitor will be added to the Attendee List. Note that no date range checks or validations are performed by checking this button. All selected validations occur only when the Conference record is saved.

Conferences Remarks

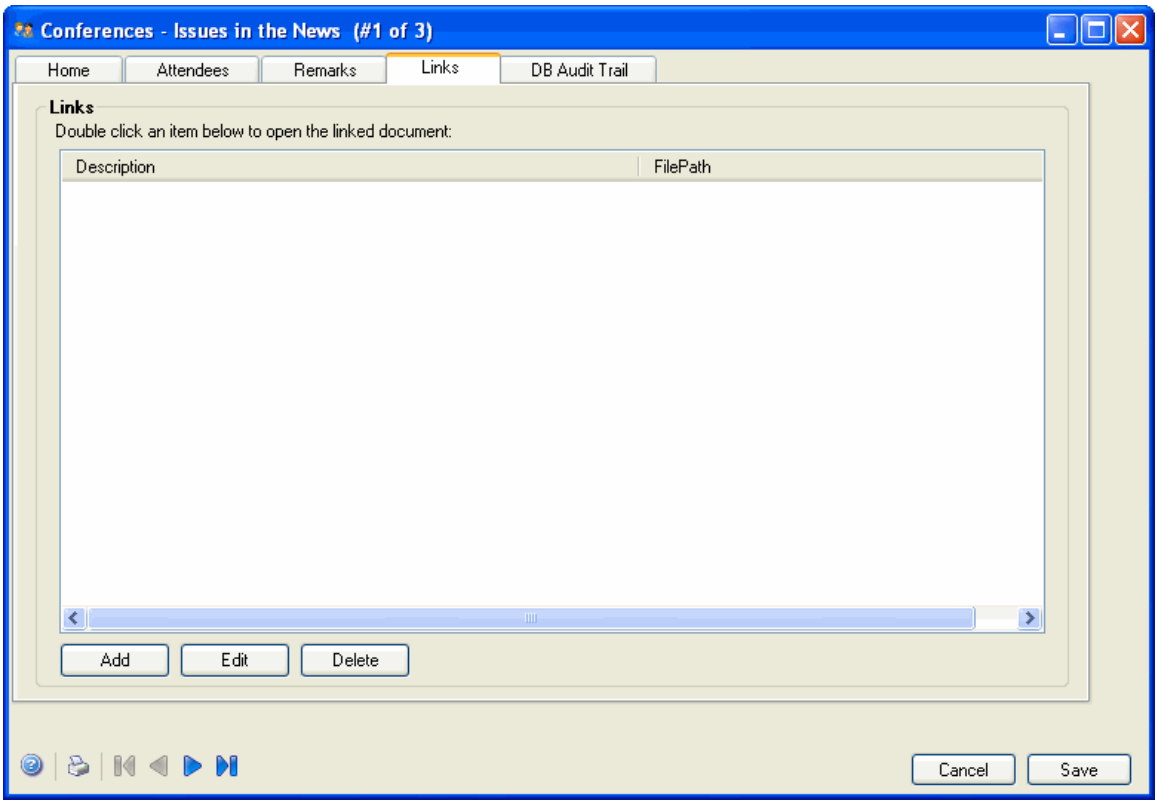


For more information about using this screen, see Input Screen.

Conferences, Remarks Page Fields

Field Name	Description
Remarks	Free-form textual information (up to 32k bytes of text).

Conferences Links



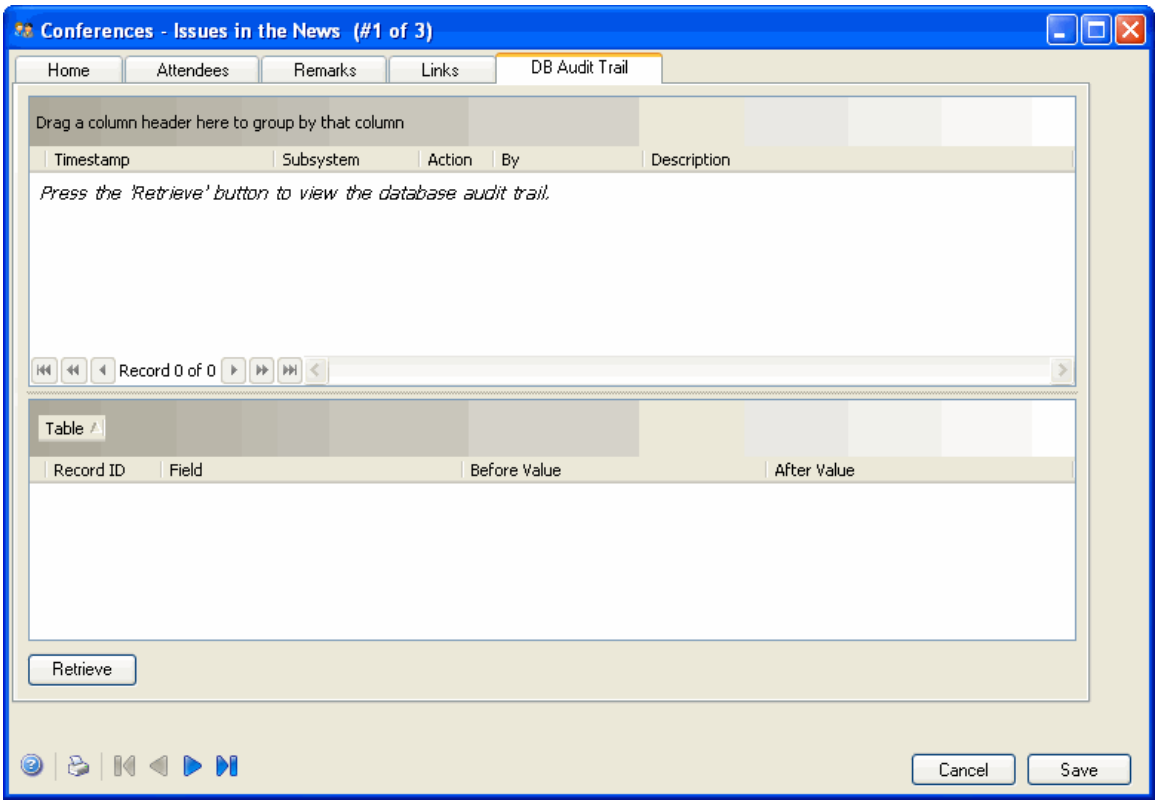
For more information about using this screen, see Input Screen.

Conferences, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Conferences DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Conferences, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

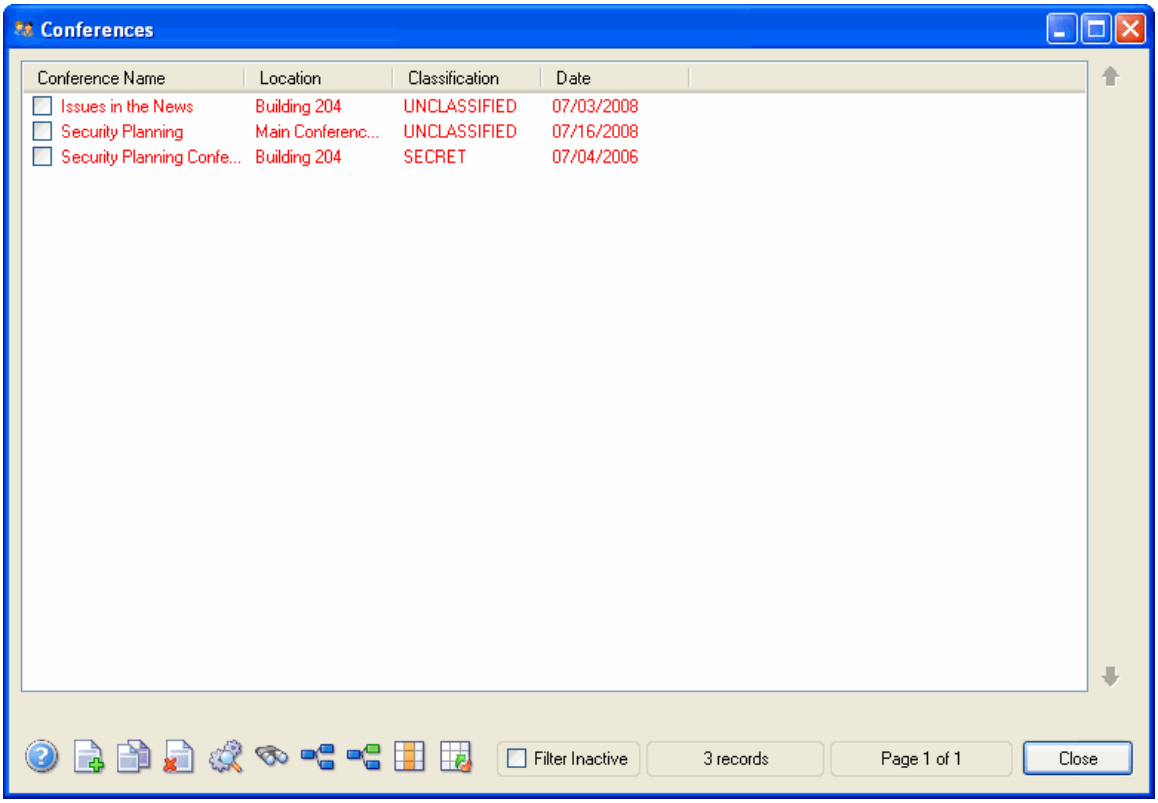
Conferences List

Default Output List

The default Conferences Output List screen shows the Conference Name, Location, Classification and Date fields for each conference record.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** check box to prevent archived conferences from appearing on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Conferences Reports

Reports Menu
For more information about the reports that appear in this module, see Standard Reports.

Incidents

Purpose of Incidents

The Incident module logs all security violations or events that need to be reported and tracked.

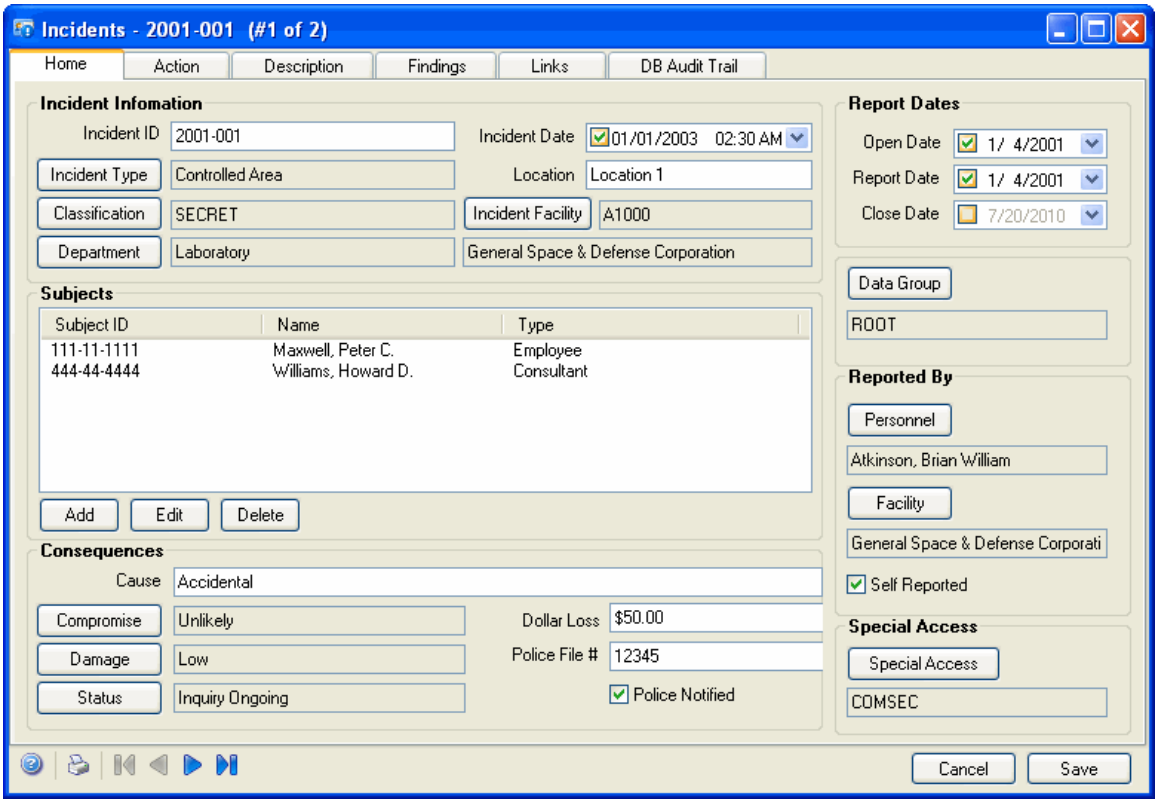
Input Screen Description
Home
Action
Description
Findings
Links

List Screen Description
Default Output List

Reports
Reports

Incidents Input

Incident Home



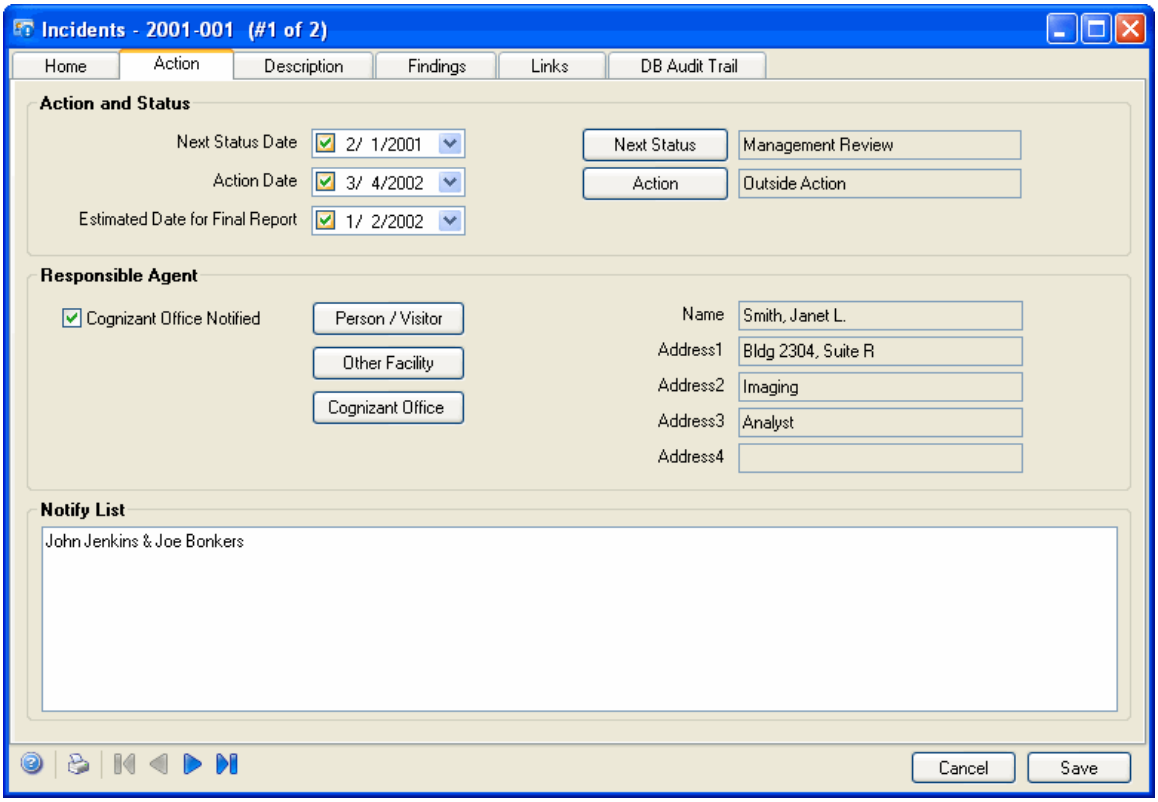
For more information about using this screen, see Input Screen.
Incidents, Home Page Fields

Field Name	Description

Incident ID	The ID can automatically increment based on settings Utilities -> Auto Numbering.
Incident Type	The type of incident. This list is maintained in the List Management Utility.
Incident Date and Time	The date and time of the event.
Classification	The classification of the compromised material.
Department	The department of the subject.
Location	The location where the event occurred.
Incident Facility	Click to select a facility for the incident. The ID and Name fields will fill in automatically.
Open Date	The date this record was created.
Report Date	The date the event was reported.
Close Date	The date this record was closed out.
Subjects	Lists the ID and name of the individual involved, the individual's type (employee, consultant, visitor, etc.), and any notes on the subject.
Data Group	The data group that the Incident record belongs to. Data groups are defined in the User Management Data Groups dialog.
Person	Click to select the individual who reported the event.
Facility	Click to select the facility that reported the event.
Self Reported?	Select to indicate that the individual reported themselves.
Special Access	Any special accesses for material compromised.
Cause	The reason for the event.
Compromise	Select the compromise that was caused by the event.
Damage	Select the damage rating: High, Moderate, Low, or None.
Status	The current status of the incident tracking.

Dollar Loss	Any monetary loss involved.
Police File #	The police case number, if filed.
Police Notified	Check if the police were notified.

Incident Action

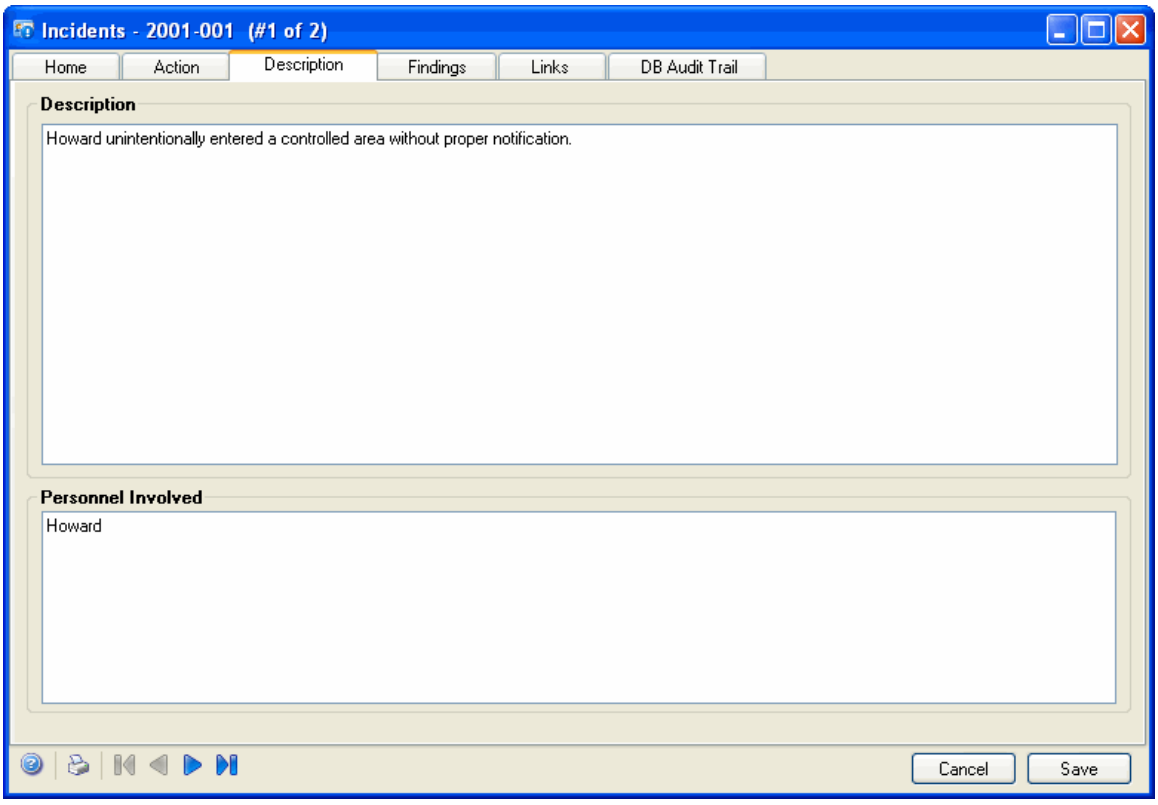


For more information about using this screen, see Input Screen.
Incidents, Action Page Fields

Field Name	Description
Next Status Date	The date the status is expected to change.
Next Status	The next status step expected.
Action Date	The date action was taken to resolve the incident.
Action	The action taken. The list of actions is maintained in the List Management Utility.

Estimated Date for Final Report	The date the report on this incident is expected to be finished.
Cognizant Office Notified?	Select to indicate that the cognizant office was notified.
Person	Click to select the responsible agent if it is a person.
Other Facility	Click to select the responsible agent if it is an other facility.
Cognizant Office	Click to select the responsible agent if it is a cognizant office.
Notify List	Any other people or agencies notified.

Incident Description

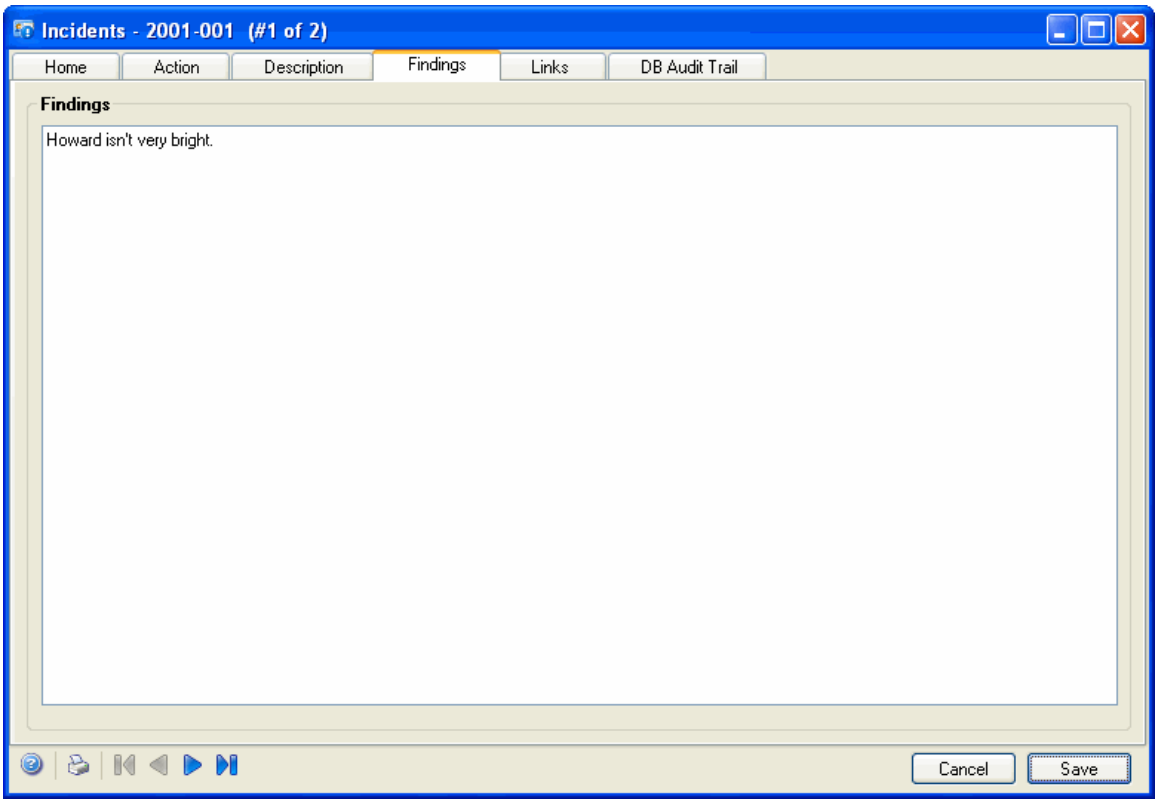


For more information about using this screen, see Input Screen.
Incidents, Description Page Fields

Field Name	Description
Description	Enter notes for a full description of the incident.

Personnel Involved	List any personnel involved other than the subject.

Incident Findings

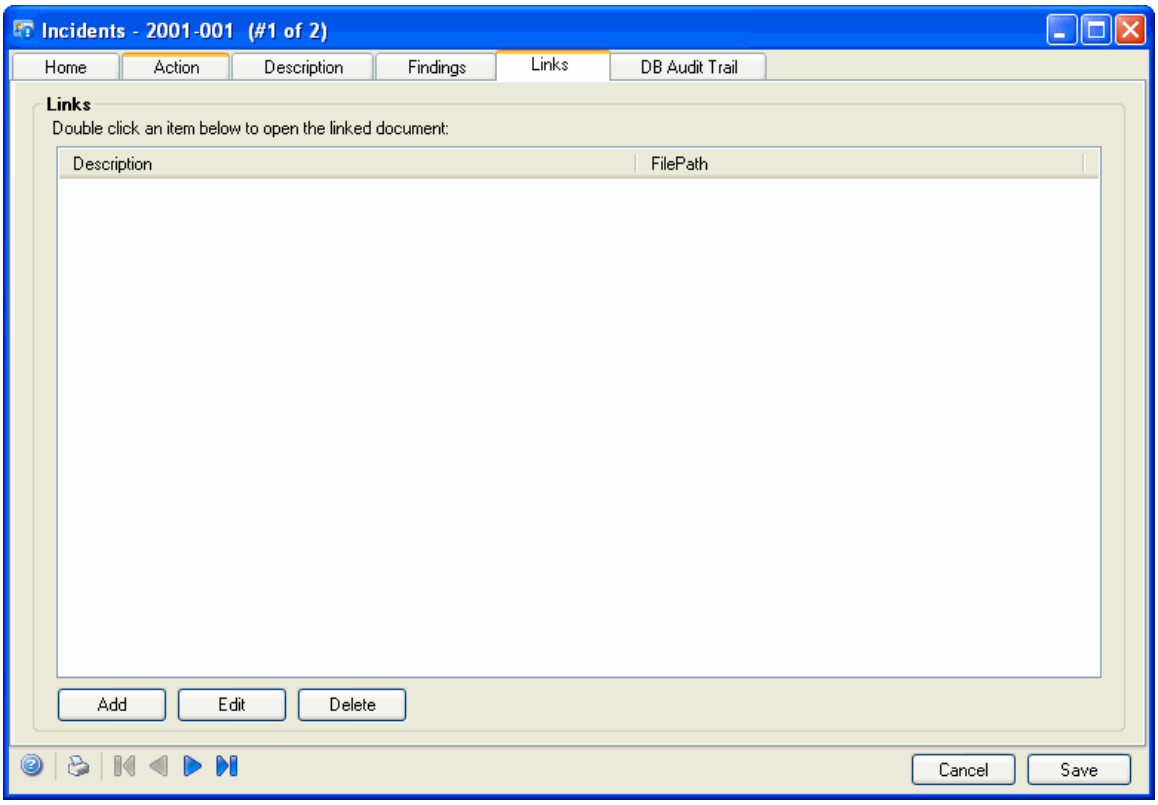


For more information about using this screen, see Input Screen.

Incidents, Findings Page Fields

Field Name	Description
Findings	Enter notes for findings after processing the incident.

Incident Links



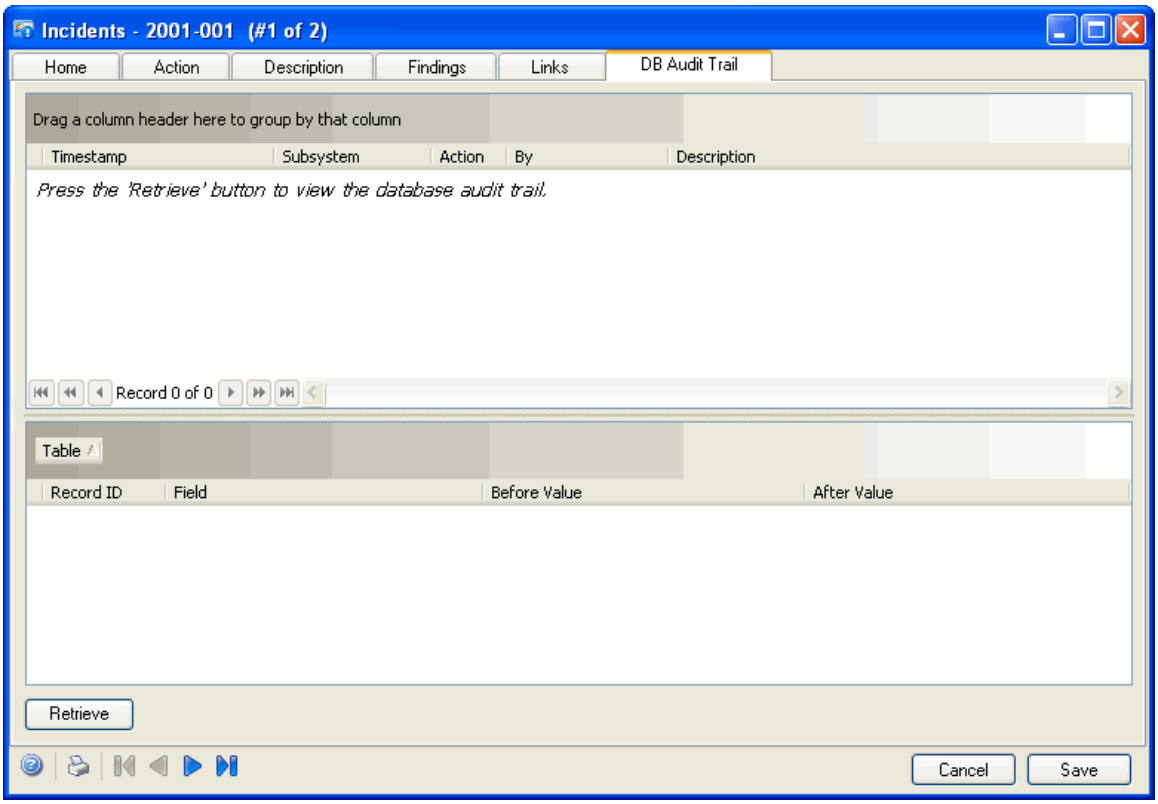
For more information about using this screen, see Input Screen.

Incidents, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Incident DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Incidents, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

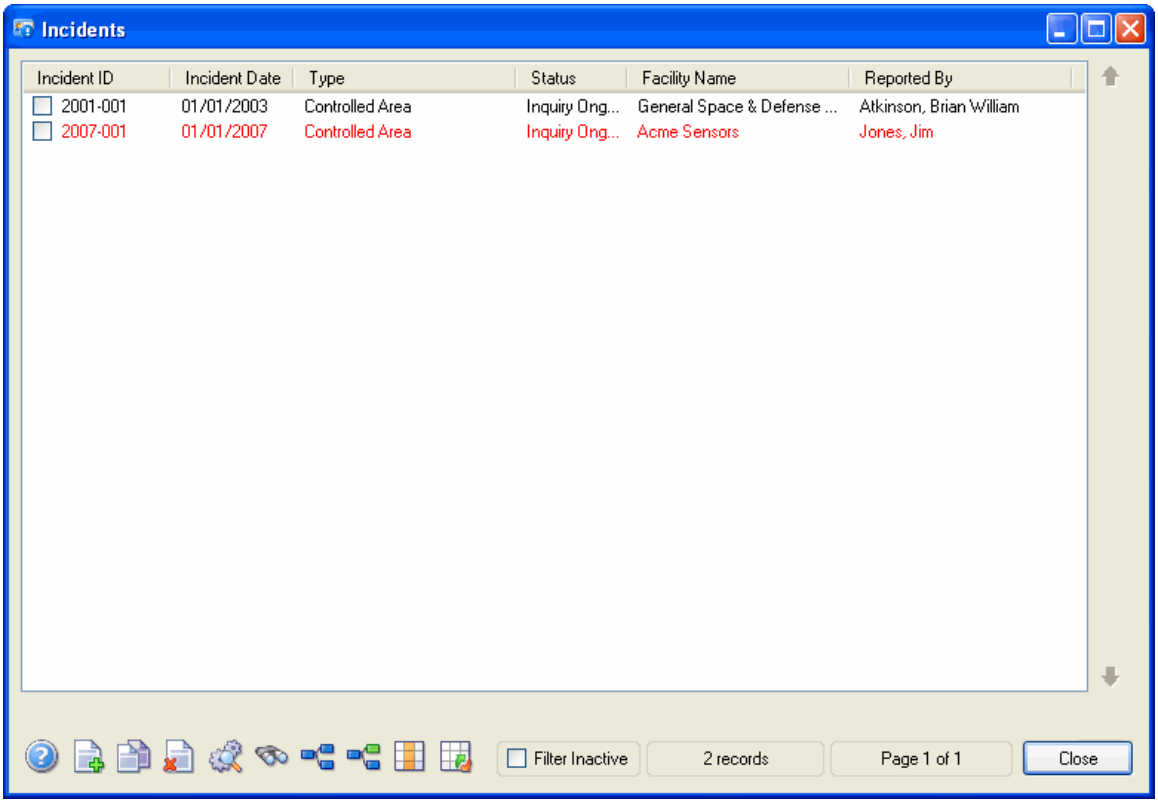
Incident List

Default Output List Screen

The Incidents default output list screen shows the Date, Type, Facility Name, Reported By, Incident ID, and Status fields for each incident record in the module.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.
- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** check box to show archived incidents on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Incident Reports

Reports Menu
For more information about the reports that appear in this module, see Standard Reports.

Locks

Purpose of Locks

Locks maintains information for all the Locks and their custodians at your facility.

The Locks module tracks the history of all Locks at your facility. Each Lock has a window showing all its keys, and conversely each Key has a window showing all the Locks it can open. SIMS does not require a lock record to be created for each key record. All Lock records have an audit trail.

Information in the Locks module is not used by any other SIMS module.

Input Screen Description
Home
History
Links
Remarks

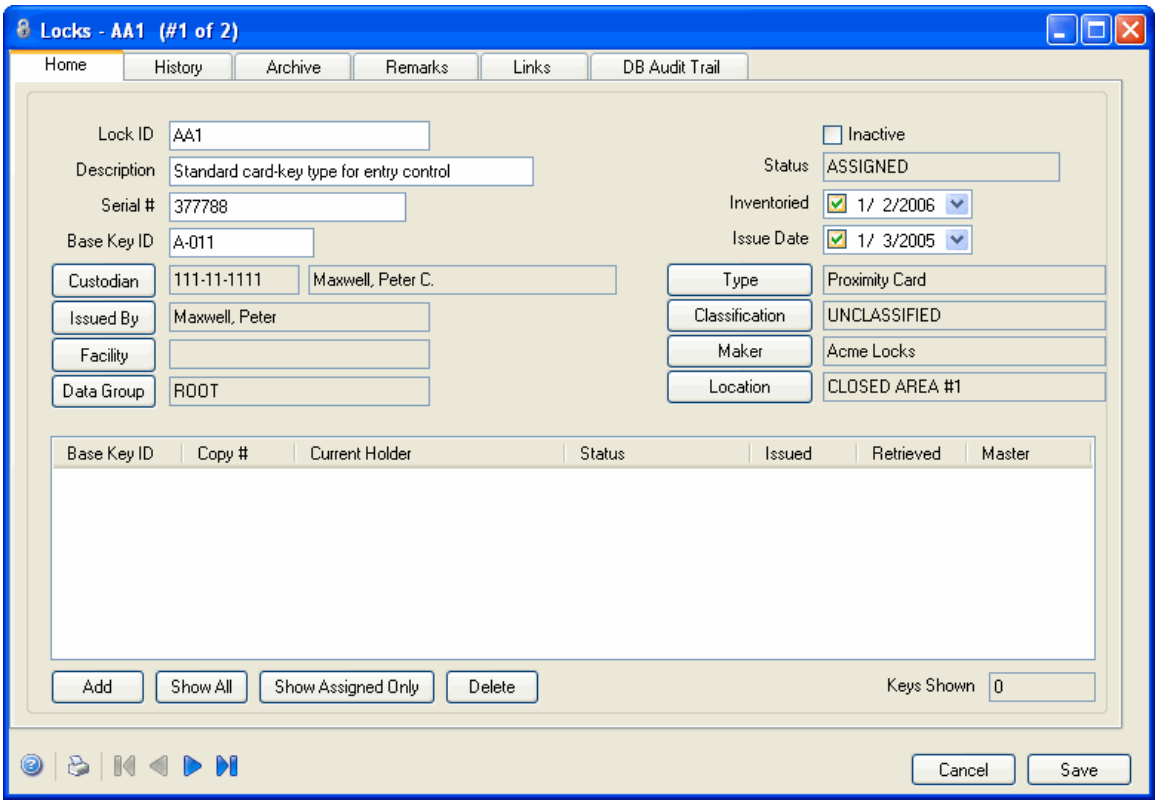
List Screen Description
Default Output List

Transactions
Transactions

Reports
Reports

Locks Input

Locks Home



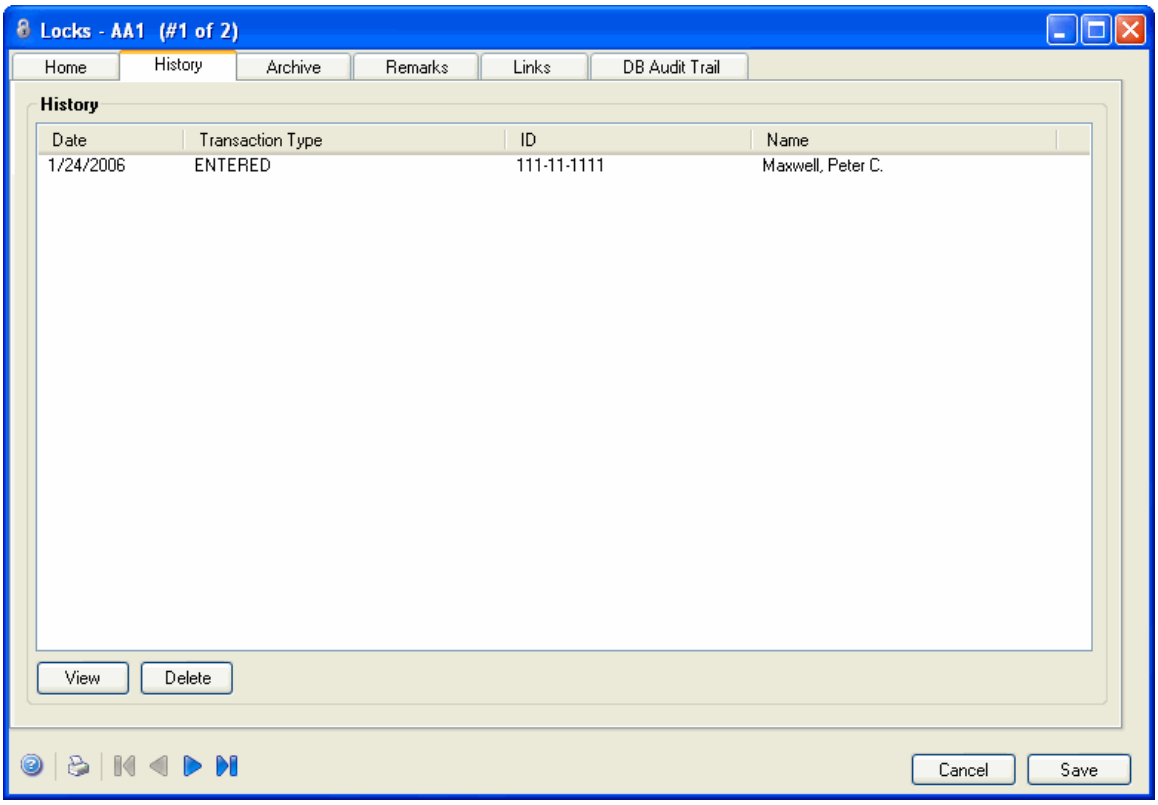
For more information about using this screen, see Input Screen.

Locks, Home Page Fields

Field Name	Description
Lock ID	The ID for the Lock.
Description	Description of the Lock.
Serial #	Serial number of the Lock.
Base Key ID	The base key ID of the Key for the Lock.
Custodian	ID and name of the custodian or person responsible for the Lock.
Issued By	Name of the person who issued the Lock.
Facility	Click **Facility** to show the Facility Record Picker.
Data Group	The data group that the lock belongs to. Data groups are defined in the User Management Data Groups dialog.
Inactive?	Indicates if a Lock is no longer used.

Status	Current status of the Lock. This value is assigned automatically when a Lock Transaction is done.
Inventoried	Date the Lock was last inventoried.
Issue Date	Date the Lock was issued.
Type	Type of Lock.
Classification	The maximum classification of any items the Locked item contains.
Maker	Manufacturer of the Lock.
Location	Location of the Lock.
Key List	List of keys that can open the Lock. Add any keys that can be used to open the Lock.
Show All	Click to list all keys assigned and unassigned to the lock.
Show Assigned Only	Click to display only the keys assigned to the lock.
Keys Shown	The number of keys displayed in the list.

Locks History



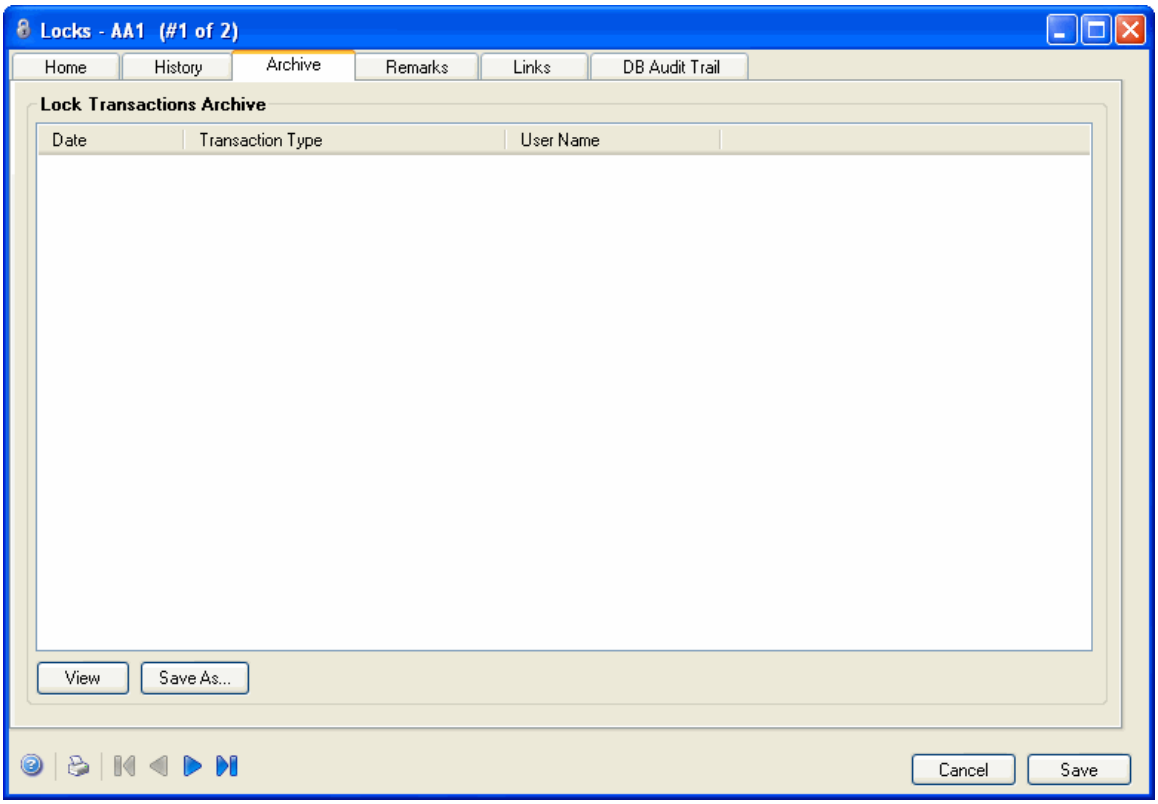
For more information about using this screen, see Input Screen.

Locks, History Page Fields

Field Name	Description
Date	The date of the lock transaction.
Transaction Type	The type of lock transaction
ID	The lock identification number.
Name	The name of the person assigned to the lock.
View	Click to view all the details for a selected lock transaction. Only SIMS managers can delete history items. This option is grayed out for all other users.

Locks Archive

A PDF file containing a copy of the Lock transaction receipt that was previously executed is created and saved for archival purposes on this tab.

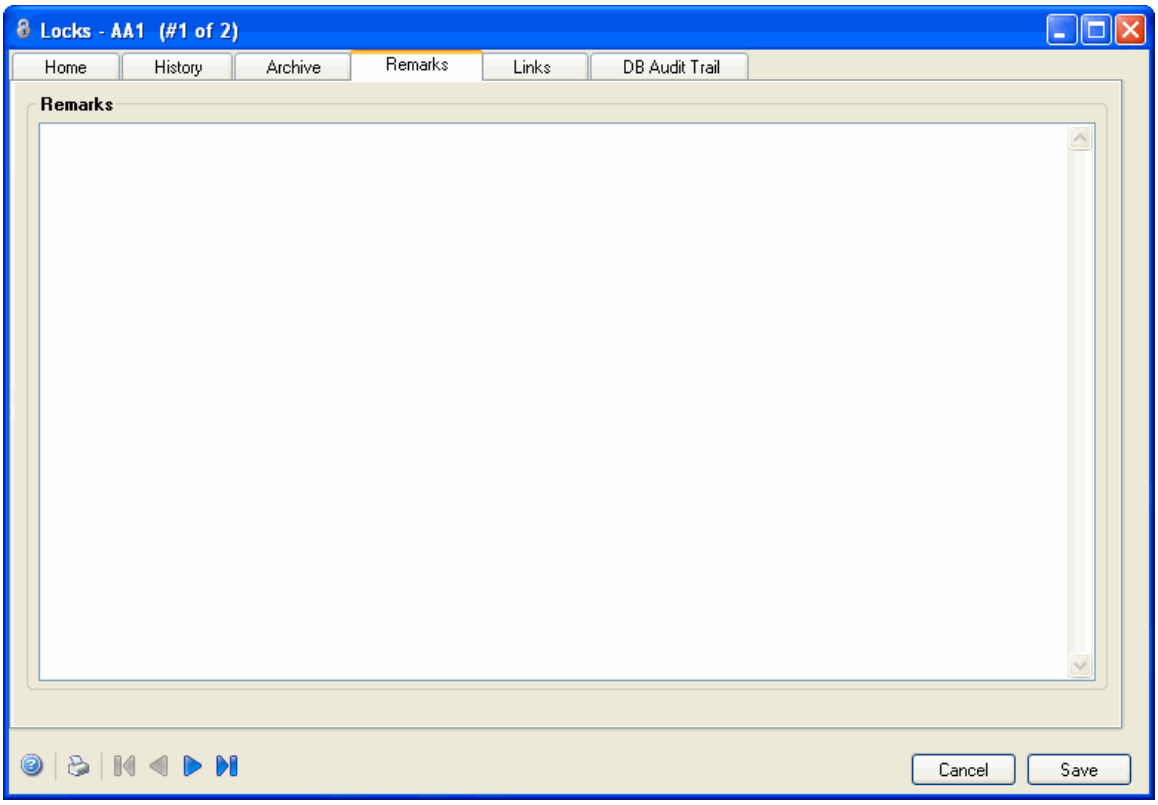


For more information about using this screen, see Input Screen.

Locks, Archive Page Fields

Field Name	Description
Date	The date that the transaction was performed.
Transaction Type	The type of transaction.
User Name	The user that performed the transaction.

Locks Remarks

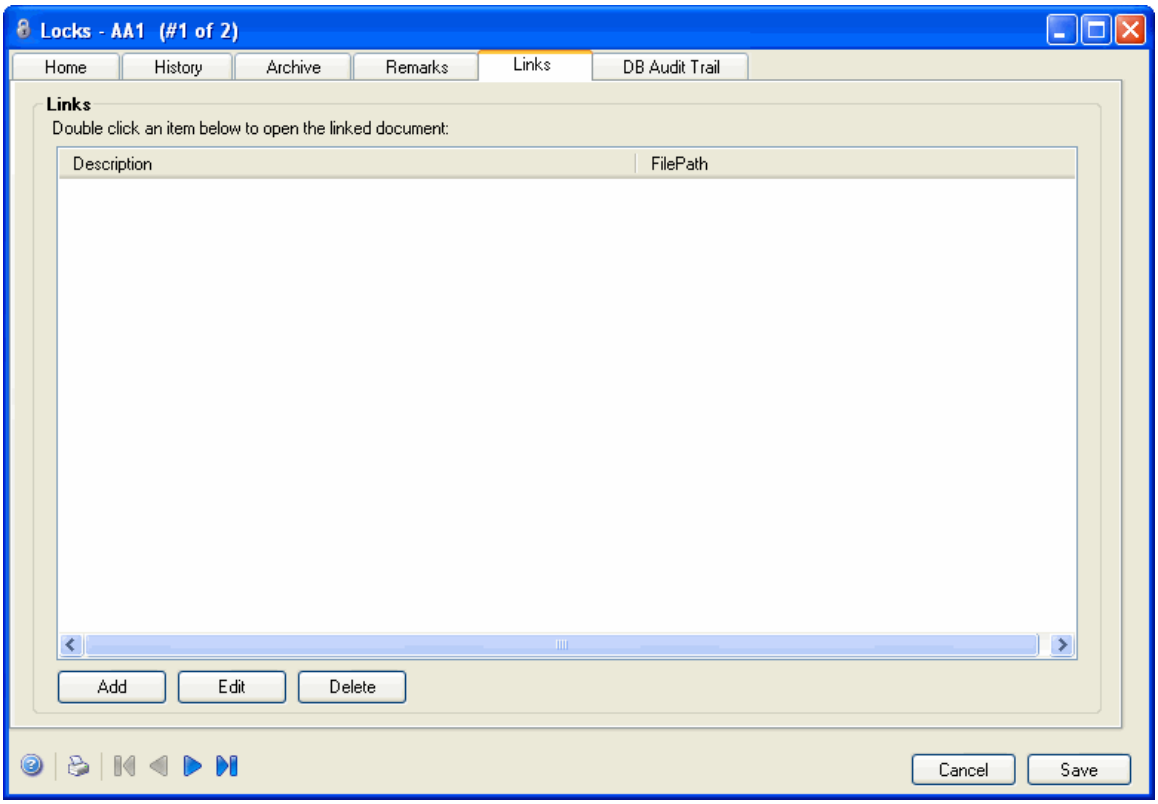


For more information about using this screen, see Input Screen.

Locks, Remarks Page Fields

Field Name	Description
Remarks	Enter any comments or remarks for the locks here. Free-form textual information (up to 32kb).

Locks Links



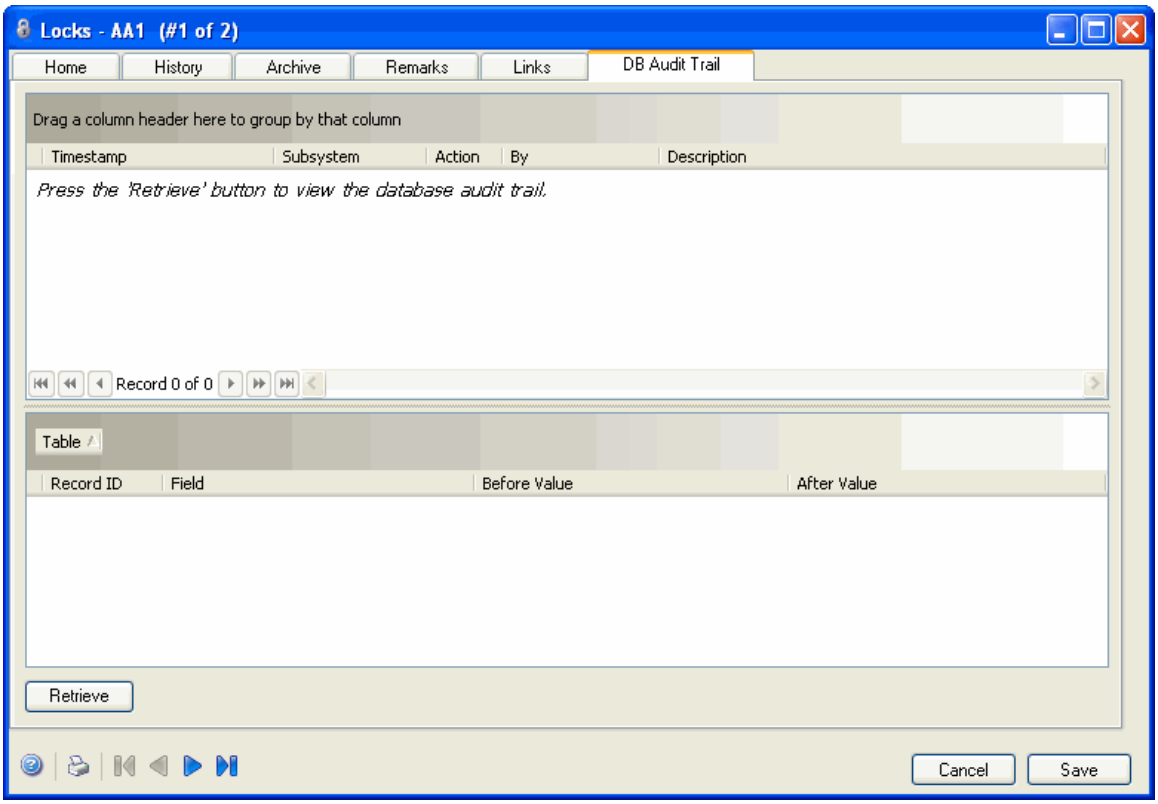
For more information about using this screen, see Input Screen.

Locks, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Locks DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Locks, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

Locks List

Default Output List Screen

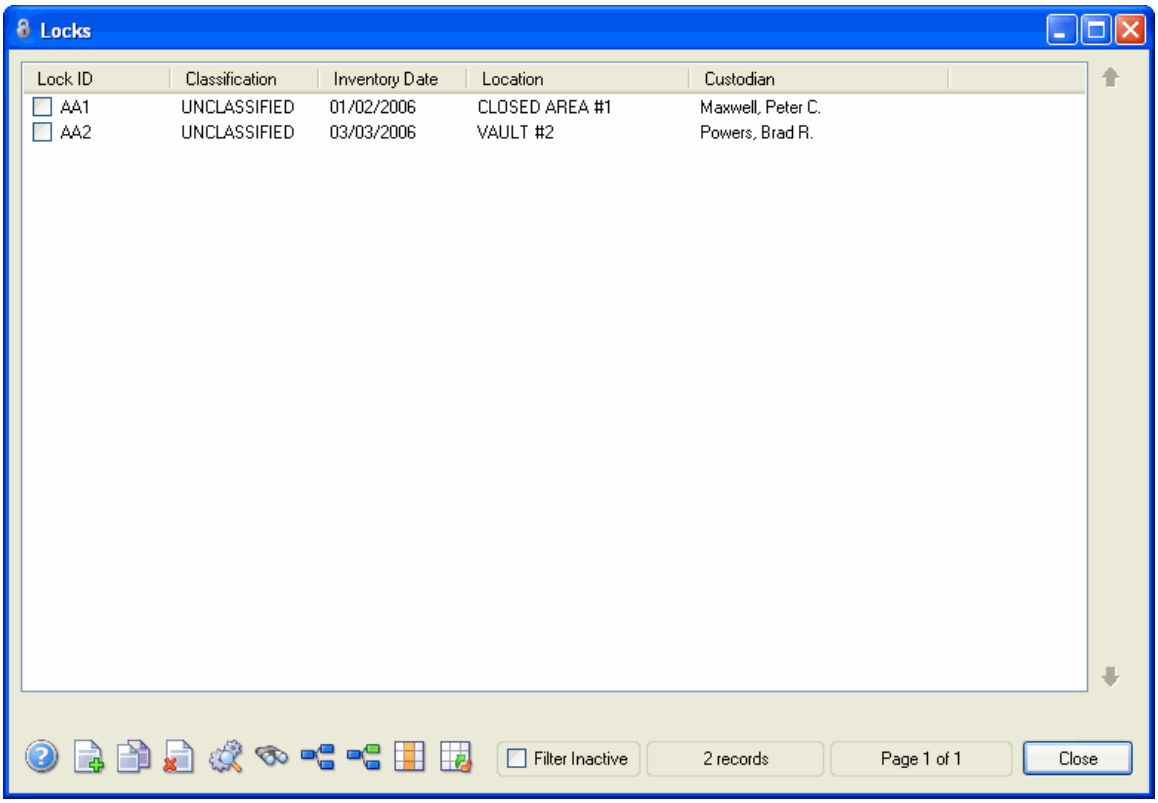
The default Locks Output List screen shows the Lock ID, Classification, Inventory Date, Location, and Custodian for each lock record.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.

- Double-click on a record to open an input screen where you can modify the fields.

Locks Output List



Filter Inactive
Check the **Filter Inactive** check box to prevent archived locks from appearing on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

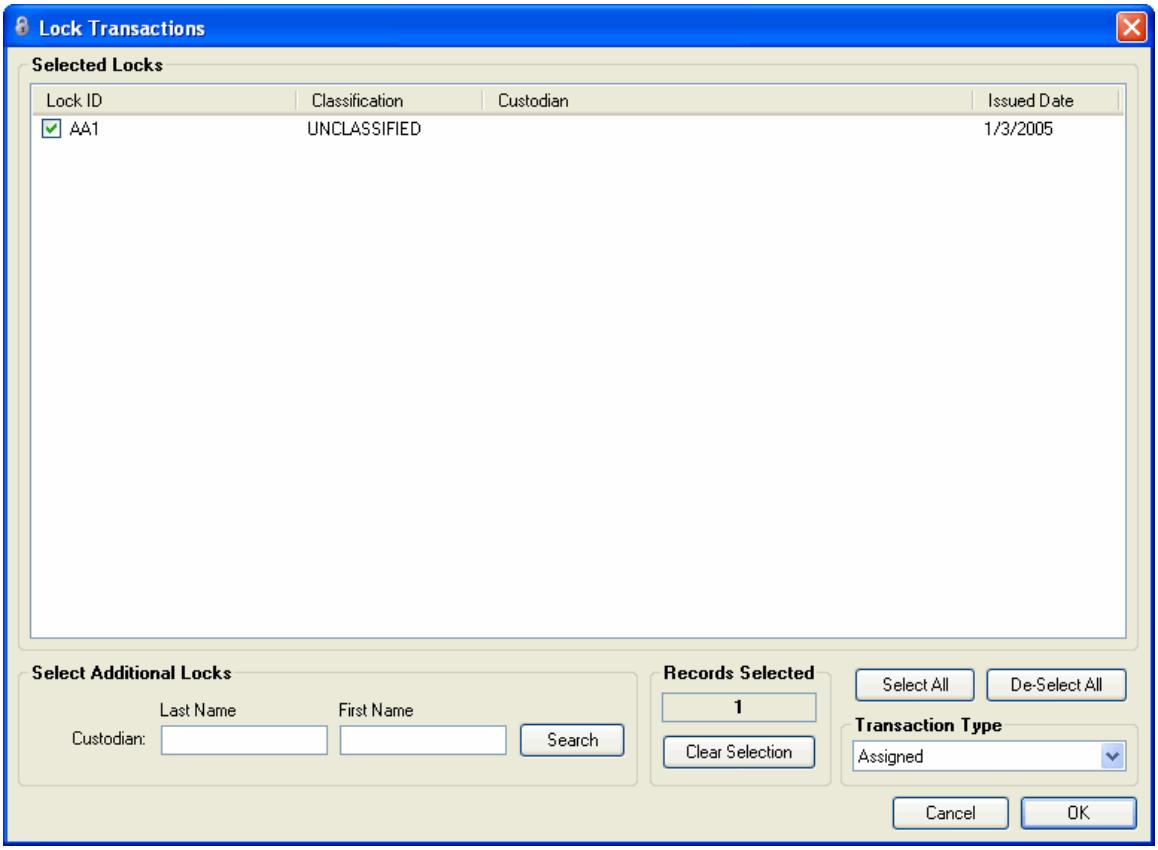
Locks Reports

Reports Menu
For more information about the reports that appear in this module, see Standard Reports.

Locks Transactions

Locks Transactions

The Lock Transactions List screen shows the Lock ID, Classification, Custodian, Location, and Issue Date for each lock transaction record for a specified transaction type.



For more information about using this screen, see Input Screen.

Locks, Transaction Page Fields

Field Name	Description
Lock ID	The lock identification number.
Classification	The classification of the lock.
Custodian	The name of the lock custodian.
Issued Date	The date the lock was issued to the custodian.
Search	Click to search for the locks by Last Name and/or First Name.
Records Selected	The number of selected records.
Transaction Type	Select the Lock Transaction Type from the option menu and then select OK to proceed with the transaction.

Transactions

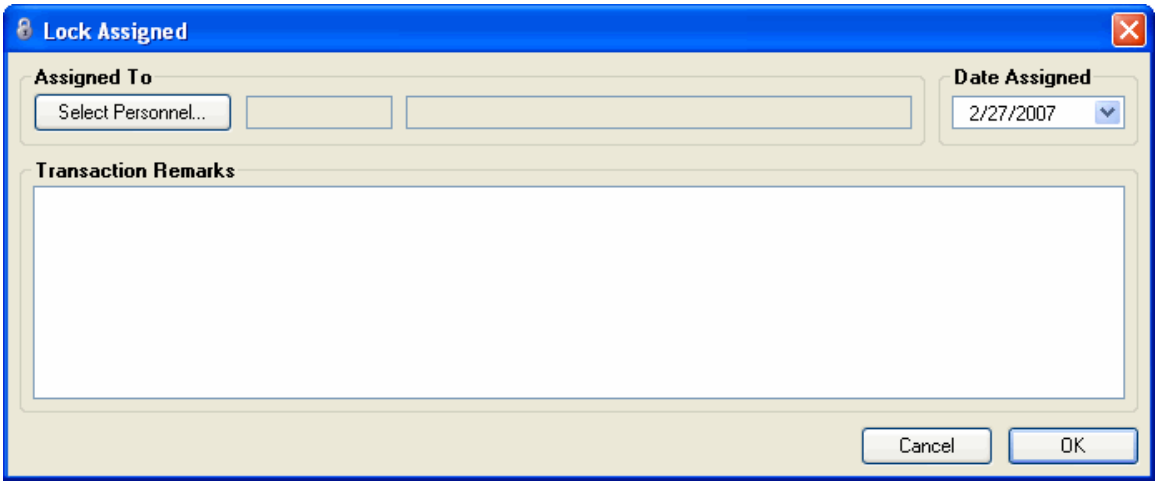
Assigned

Combination Change

Damaged
Destroyed
Inventoried
Loaned
Lost
Re-keyed
Retrieved

Lock Assigned

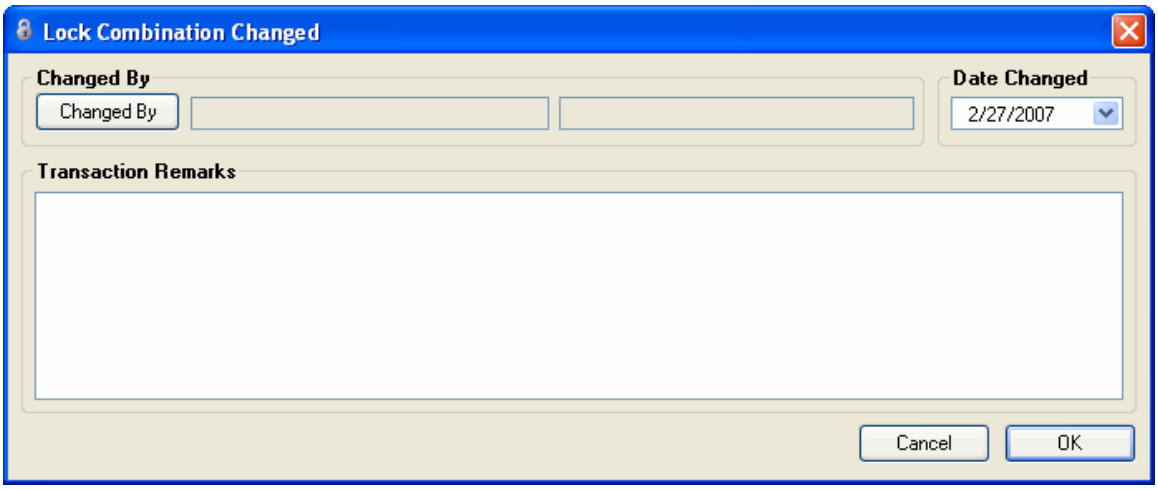
Lock Assigned Transactions allows you to assign one or more locks to an individual in one step. A record of the assignment will be put in the history for each Lock record.



Assigned To
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Assigned
Enter the date the lock(s) will be assigned. The **Date Assigned** defaults to the current system date.
Click **OK** to complete the transaction.

Lock Combination Change

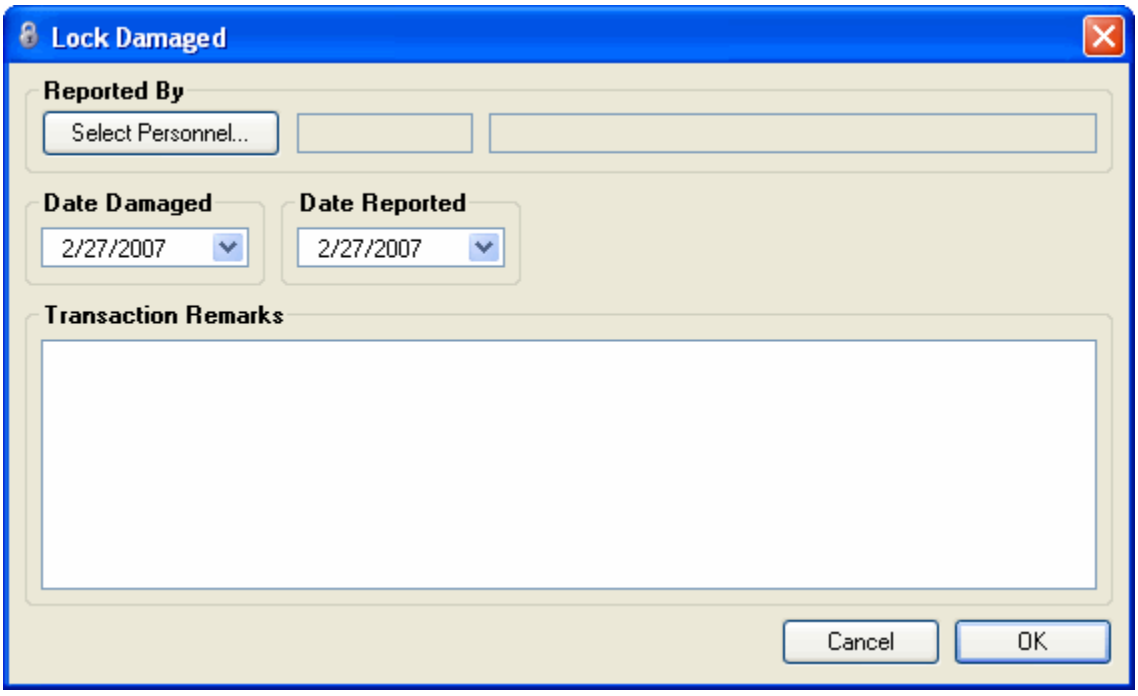
Lock Combination Change Transactions allows you to record a combination change to one or more locks in one step. A record of the assignment will be put in the history for each Lock record.



Changed By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Changed
Enter the date the lock(s) combination will be changed. The **Date Changed** defaults to the current system date.
Click **OK** to complete the transaction.

Locks Damaged

Lock Damaged Transactions allows you to change the status of one or more locks to "Damaged" in one step. A record of the damaged lock will be put in the history for each Lock record.

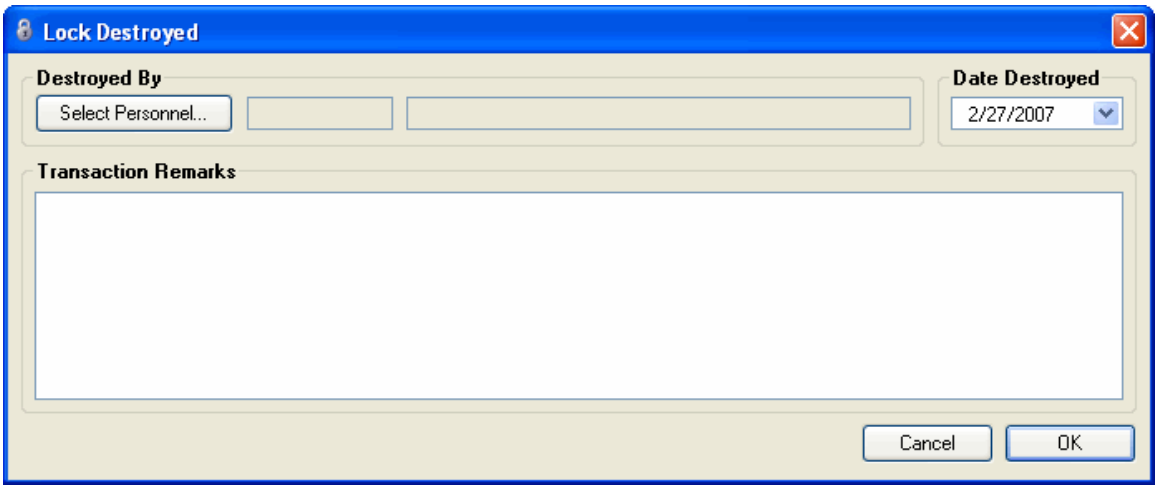


Reported By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Damaged
Enter the date the lock(s) was damaged. The **Date Damaged** defaults to the current system date.

Date Reported
Enter the date the damaged lock(s) was reported. The **Date Reported** defaults to the current system.
Click **OK** to complete the transaction.

Lock Destroyed

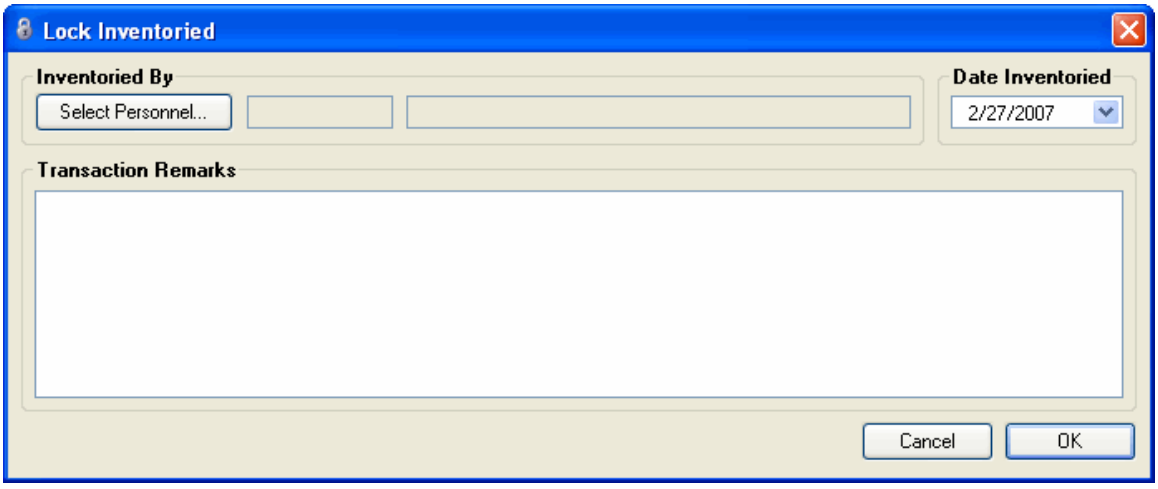
Lock Destroyed Transactions allows you to change the status of one or more locks to "Destroyed" in one step. A record of the destroyed lock will be put in the history for each Lock record.



Destroyed By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Destroyed
Enter the date the lock(s) was destroyed. The **Date Destroyed** defaults to the current system date.
Click **OK** to complete the transaction.

Lock Inventoried

Lock Inventoried Transactions allows you to change the status of one or more locks to "Inventoried " in one step. A record of the inventoried lock will be put in the history for each Lock record.

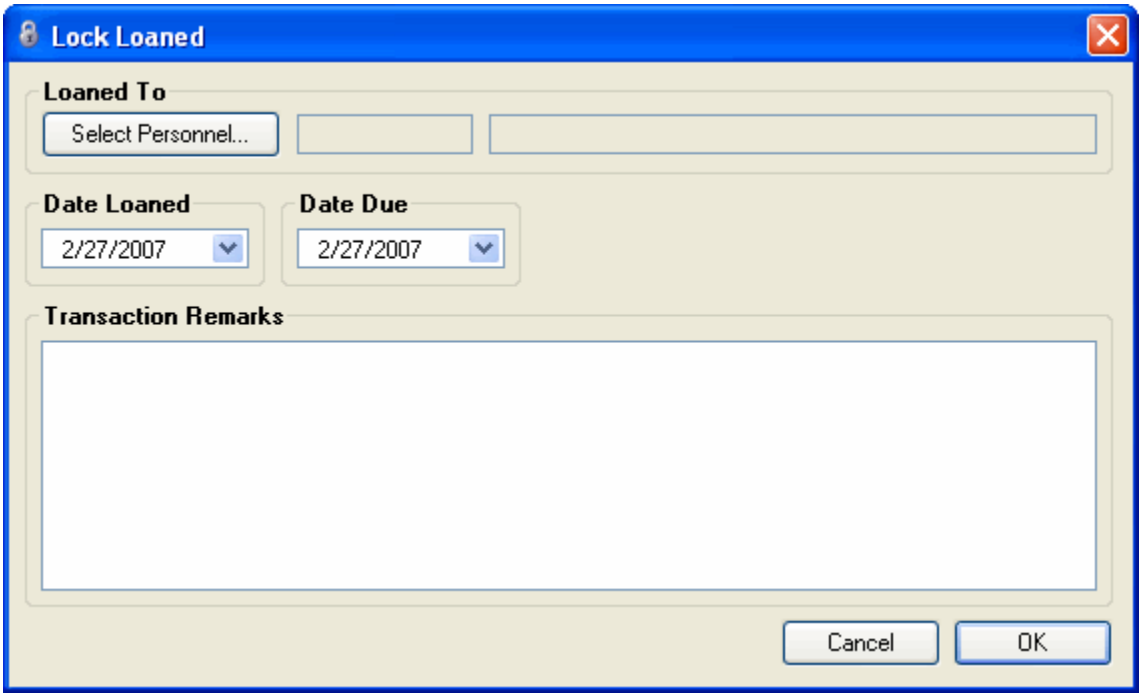


Inventoried By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the

name will appear in the box to the right of the button.
Date Inventoried
Enter the date the lock(s) was inventoried. The **Date Inventoried** defaults to the current system date.
Click **OK** to complete the transaction.

Lock Loaned

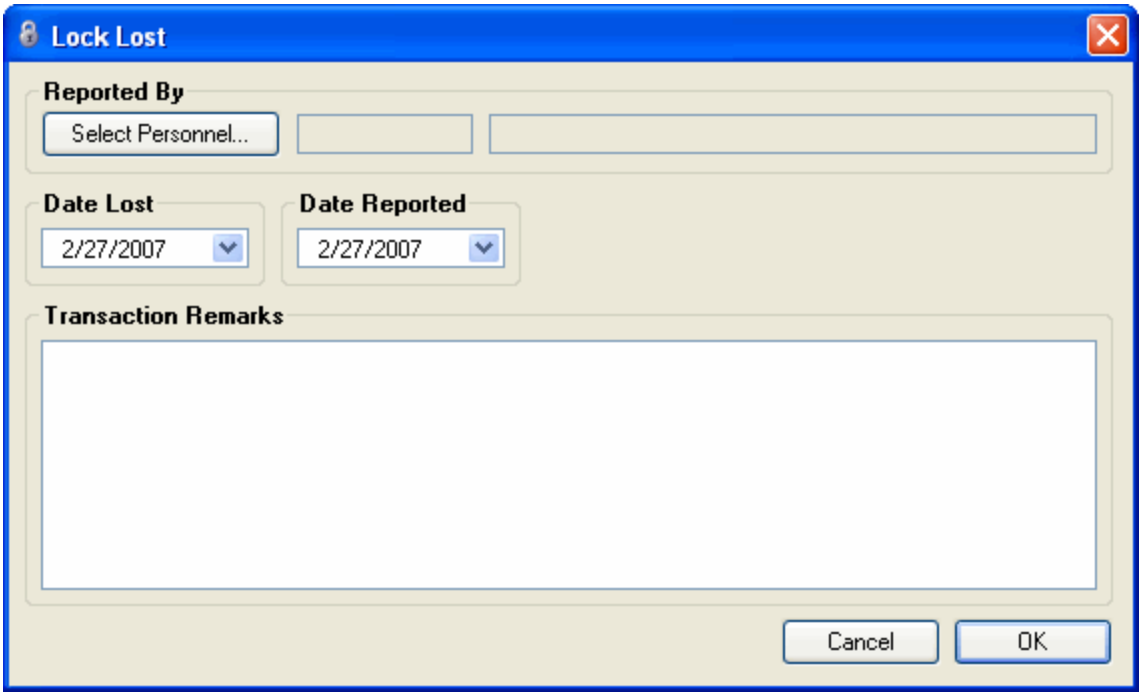
Lock Loaned Transactions allows you to change the status of one or more locks to "Loaned " in one step. A record of the loaned lock will be put in the history for each Lock record.



Loaned To
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Loaned
Enter the date the lock(s) was loaned. The **Date Loaned** defaults to the current system date.
Date Due
Enter the date the lock(s) is due back. The **Date Due** defaults to the current system date.
Click **OK** to complete the transaction.

Lock Lost

Lock Lost Transactions allows you to change the status of one or more locks to "Lost " in one step. A record of the lost lock will be put in the history for each Lock record.



Reported By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Lost
Enter the date the lock(s) was lost. The **Date Lost** defaults to the current system date.
Date Reported
Enter the date the lost lock(s) was reported. The **Date Reported** defaults to the current system date.
Click **OK** to complete the transaction.

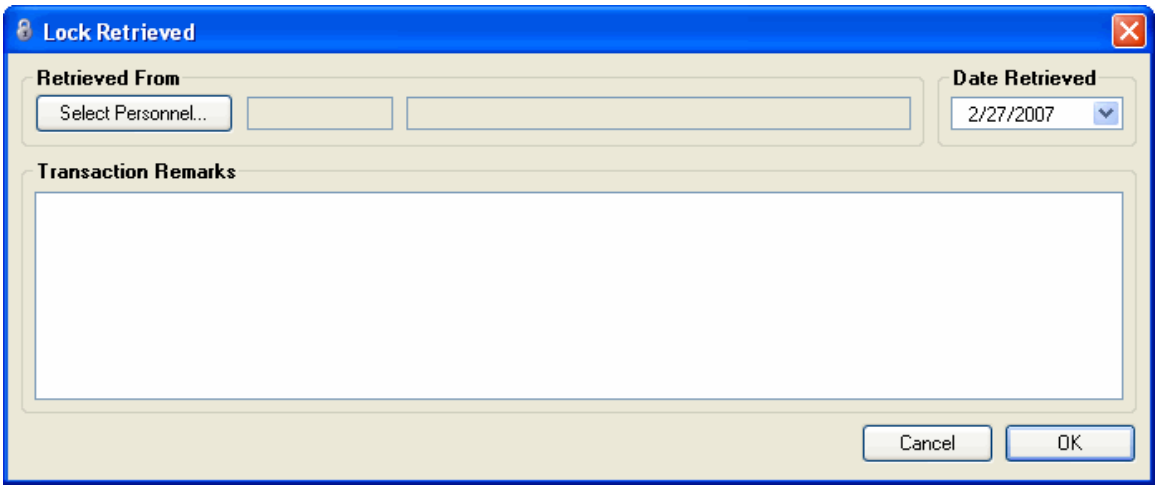
Lock Re-keyed

Lock Re-keyed Transactions allows you to change the status of one or more locks to "Re-keyed" in one step. A record of the lost lock will be put in the history for each Lock record.

Re-keyed By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Re-Keyed
Enter the date the lock(s) was re-keyed. The **Date Re-Keyed** defaults to the current system date.
Click **OK** to complete the transaction.

Lock Retrieved

Lock Retrieved Transactions allows you to change the status of one or more locks to "Retrieved " in one step. A record of the retrieved lock will be put in the history for each Lock record.



Retrieved From
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Retrieved
Enter the date the lock(s) was retrieved. The **Date Retrieved** defaults to the current system date.
Click **OK** to complete the transaction.

Keys

Purpose of Keys

Keys maintains information for all the Keys and their custodians at your facility.

The Keys module tracks the history of all Keys at your facility. This also includes Key Rings, Key Hooks, and Master Keys. Each Key has a window showing all the Locks it can open. All Key, Key Ring, and Key Hook records have an audit trail.

Information in the Keys module is not used by any other SIMS module.

Input Screen Description
Home
Hooks and Rings
History
Links
Remarks

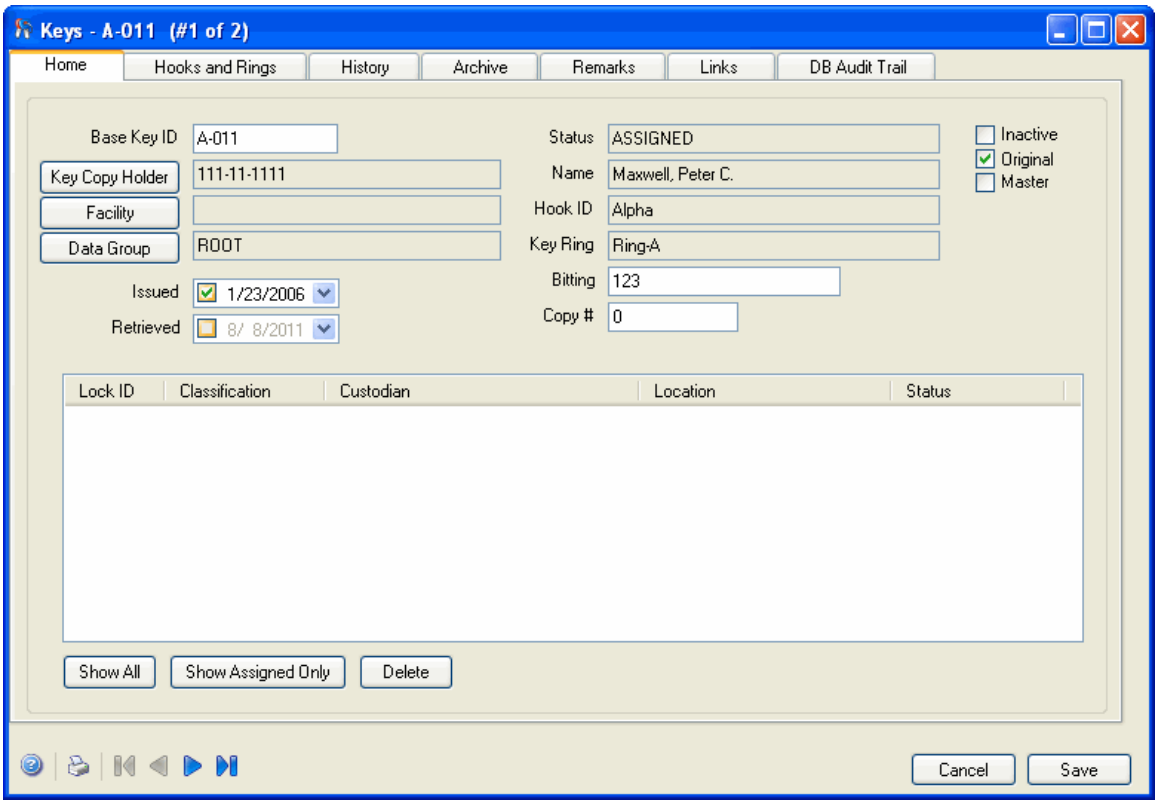
List Screen Description
Default Output List

Transactions
Transactions

Reports
Reports

Keys Input

Keys Home



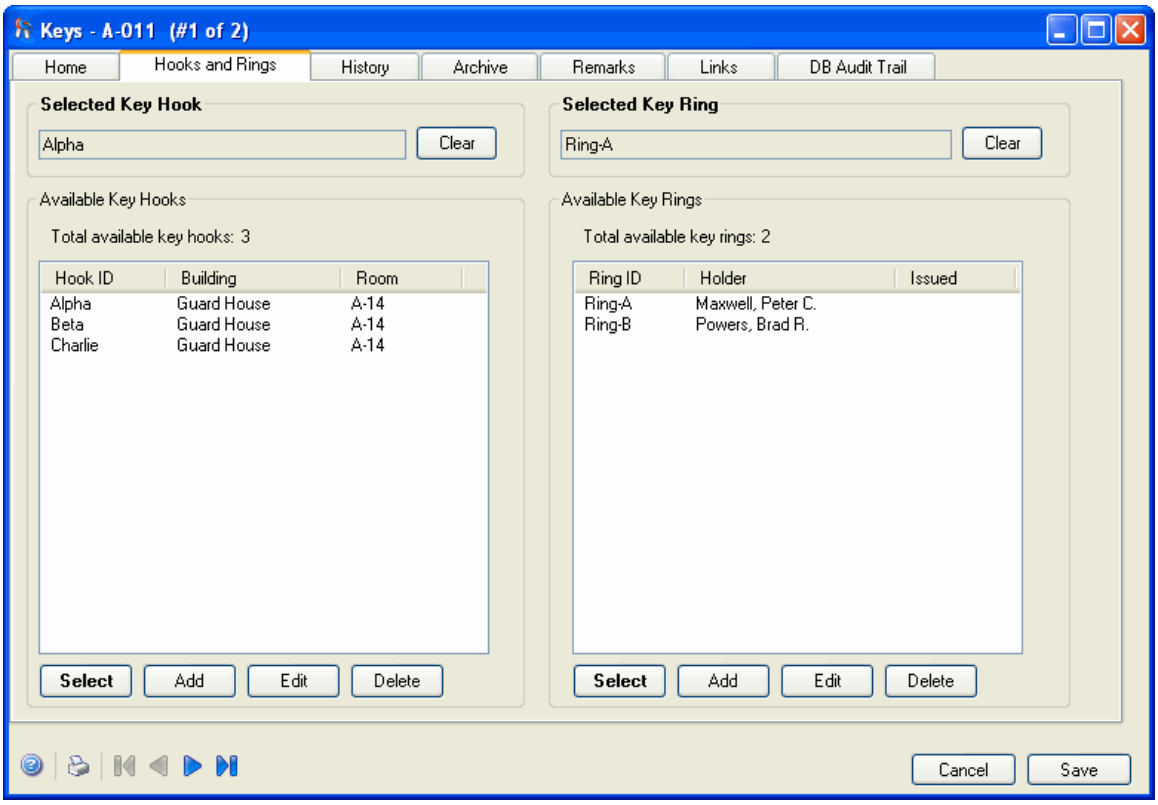
For more information about using this screen, see Input Screen.

Keys, Home Page Fields

Field Name	Description
Base Key ID	The combination of the Base Key ID and the Copy # can be used to make a unique value for each Key record.
Key Copy Holder	The Key Copy Holder field is linked to the Personnel or Visitor Pick Lists.
Facility	Click **Facility** to show the Facility Record Picker.
Data Group	The data group that the key belongs to. Data groups are defined in the User Management Data Groups dialog.
Issued	Date the key was issued.
Retrieved	Date the key was returned.
Status	Current status of the Key. This value is assigned automatically when a Key Transaction is done.
Name	Name of the Key Holder.

Hook ID	Hook ID if key is part of hook set.
Key Ring	Ring ID if key is part of ring set.
Copy #	Copy # of the Key. The combination of the Base Key ID and the Copy # makes a unique value for each Key record.
Bitting	Number used by the locksmith to identify the pattern of the key.
Inactive?	Check this if a Key is no longer used.
Original?	Check this if a Key is an original.
Master?	Check this if a Key is the master that can open multiple Locks.
Lock List	List of Locks that this key can open. There is usually only one Lock, unless the key is a Master key, which is assigned to Locks in the Lock record module. If the key was assigned to a lock in the Locks module, then the Lock will appear in this list.
Show All	Click to display all assigned and unassigned locks that the key can open.
Show Assigned Only	Click to display only the assigned locks that the key can open.

Keys Hooks and Rings

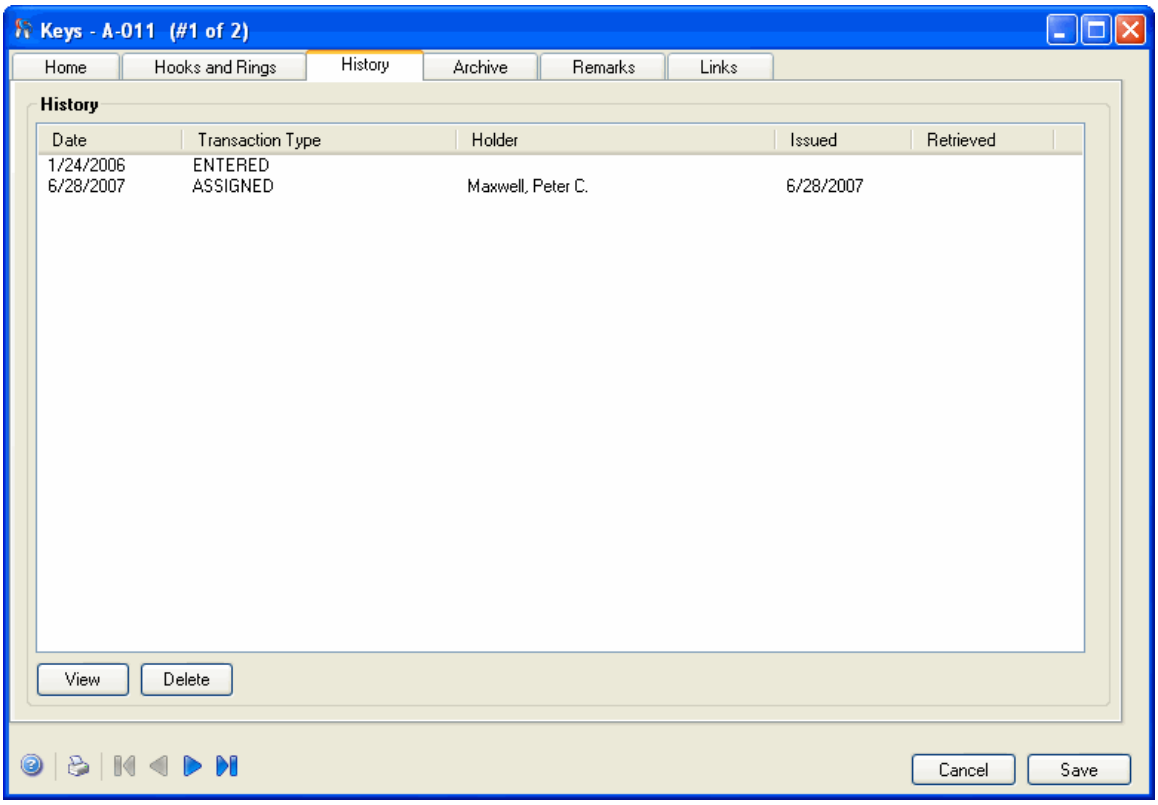


For more information about using this screen, see Input Screen.

Keys Hooks and Rings, Page Fields

Field Name	Description
Selected Key Hook	The selected key hook.
Hook ID	ID value for identifying the hook.
Building	Building location for the hook.
Room	Room location for the hook.
Selected Key Ring	The selected key ring.
Ring ID	ID value for identifying the ring.
Holder	ID and name of the custodian or person responsible for the key ring.
Issued	Date last issued.

Keys History

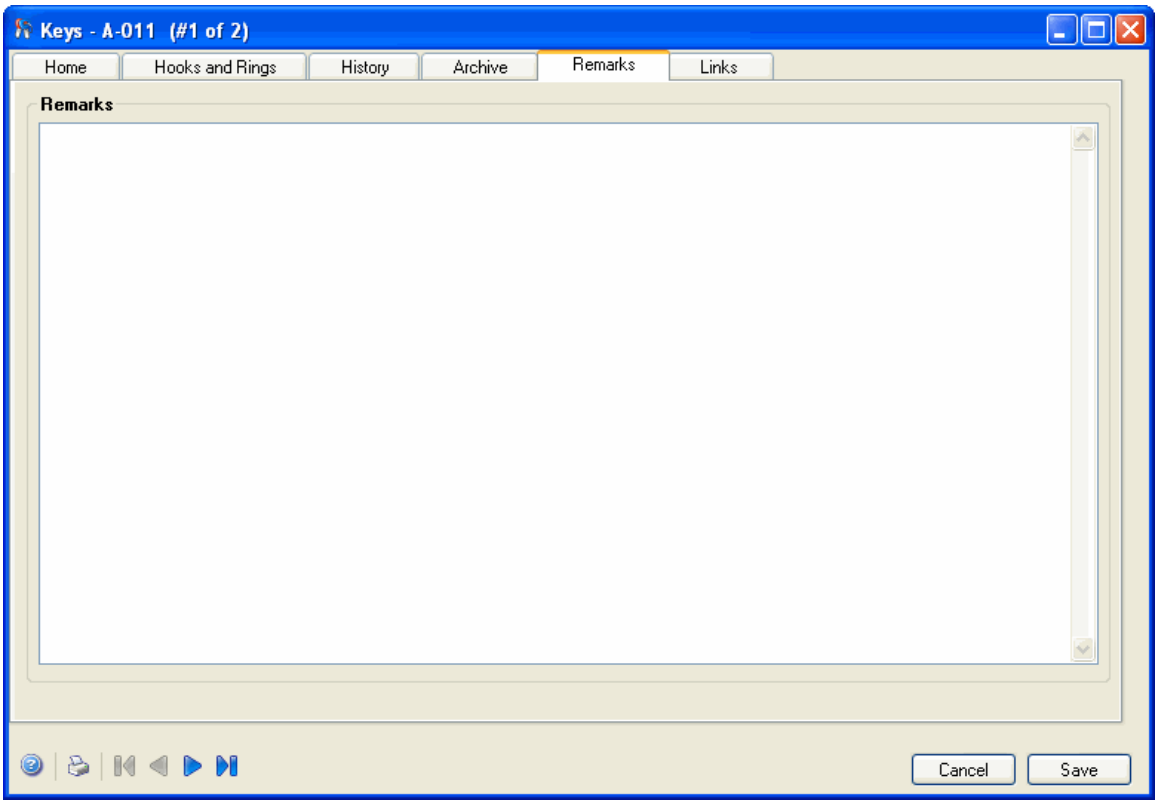


For more information about using this screen, see Input Screen.

Keys, History Page Fields

Field Name	Description
Date	The date of the key transaction.
Transaction Type	The type of key transaction
Holder	The name of the person assigned to the key.
Issued	The date the key was issued.
Retrieved	The date the key was retrieved.
View	Click to view all the details for a selected key transaction.
Delete	Click to delete a selected key transaction. Only SIMS managers can delete history items. This option is grayed out for all other users.

Keys Remarks

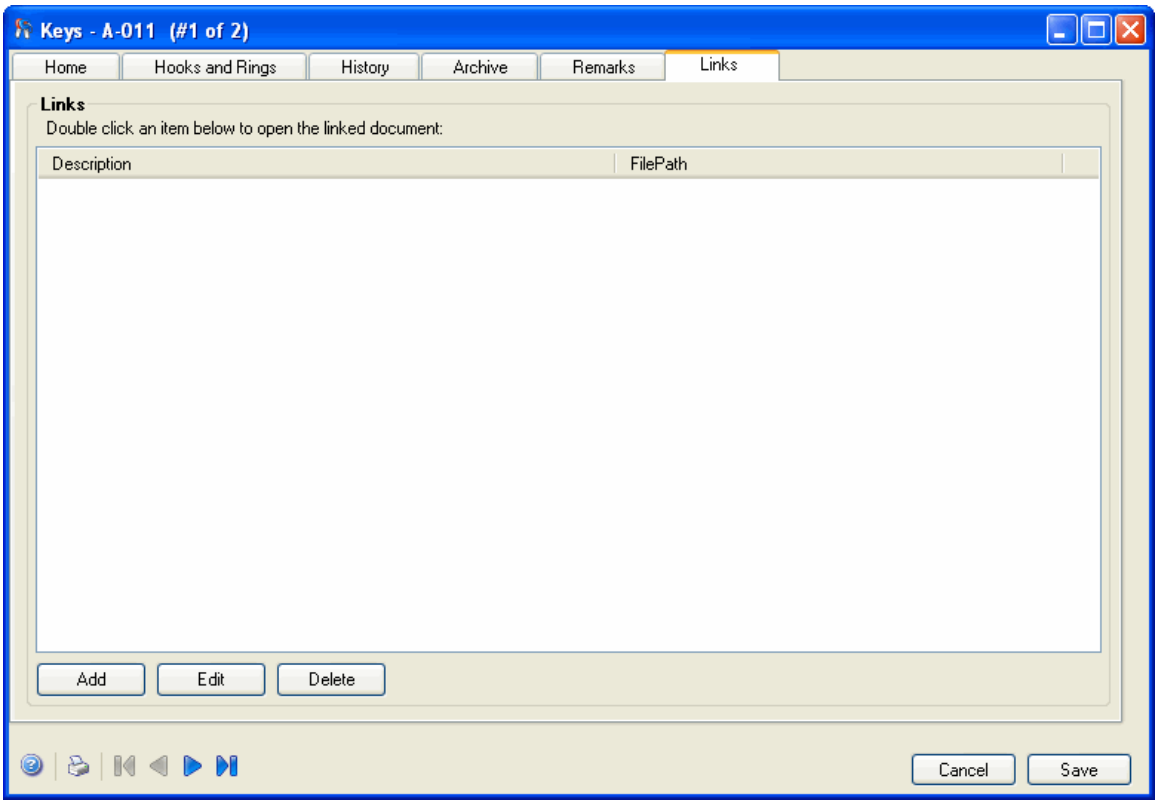


For more information about using this screen, see Input Screen.

Keys, Remarks Page Fields

Field Name	Description
Remarks	Enter any comments or remarks for the keys here. Free-form textual information (up to 32kb).

Keys Links



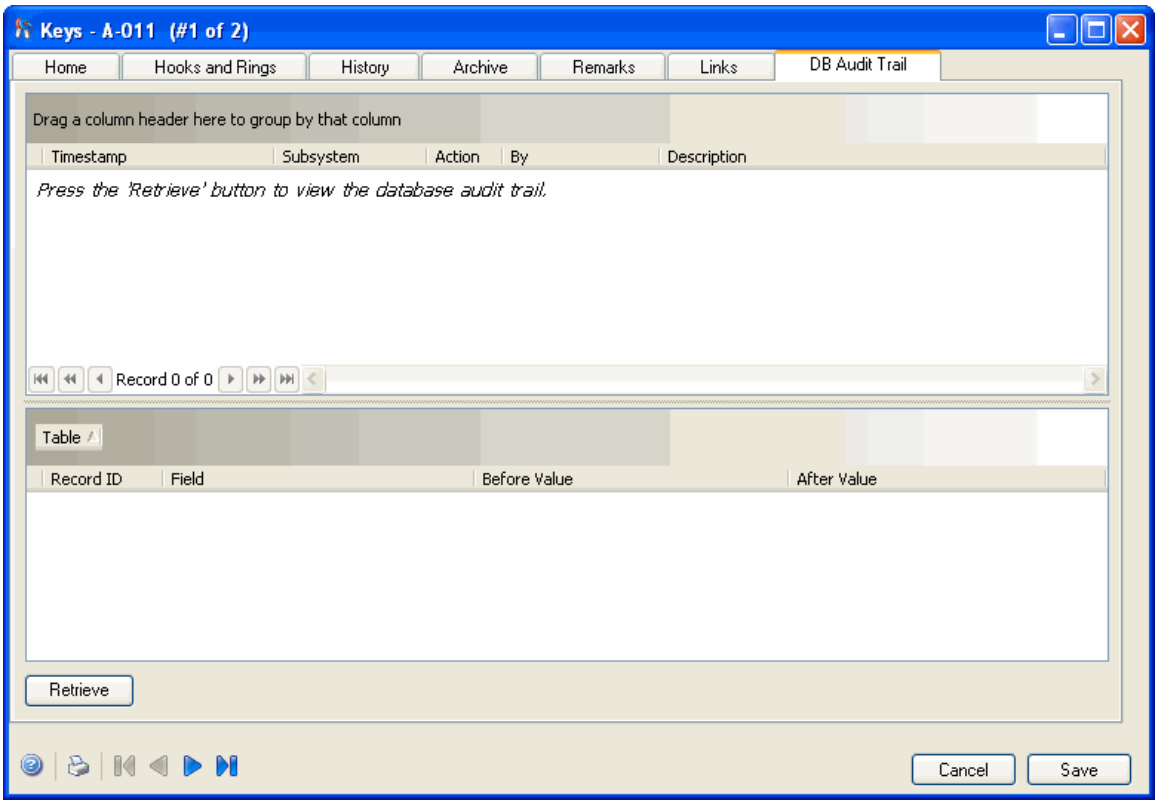
For more information about using this screen, see Input Screen.

Keys, Links Page Fields

Field Name	Description
Description	A brief description of the linked file.
File Path	The full path and file name of the linked file.

Keys DB Audit Trail

Select the Retrieve button to display the record's audit trail. A SIMS Manager can run a report and manage audit trail changes by going to Utilities -> Database Audit Trail.



For more information about using this screen, see Input Screen.

Keys, DB Audit Trail Page Fields

Field Name	Description
Timestamp	The timestamp that the modification was made.
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

Keys List Screen Description

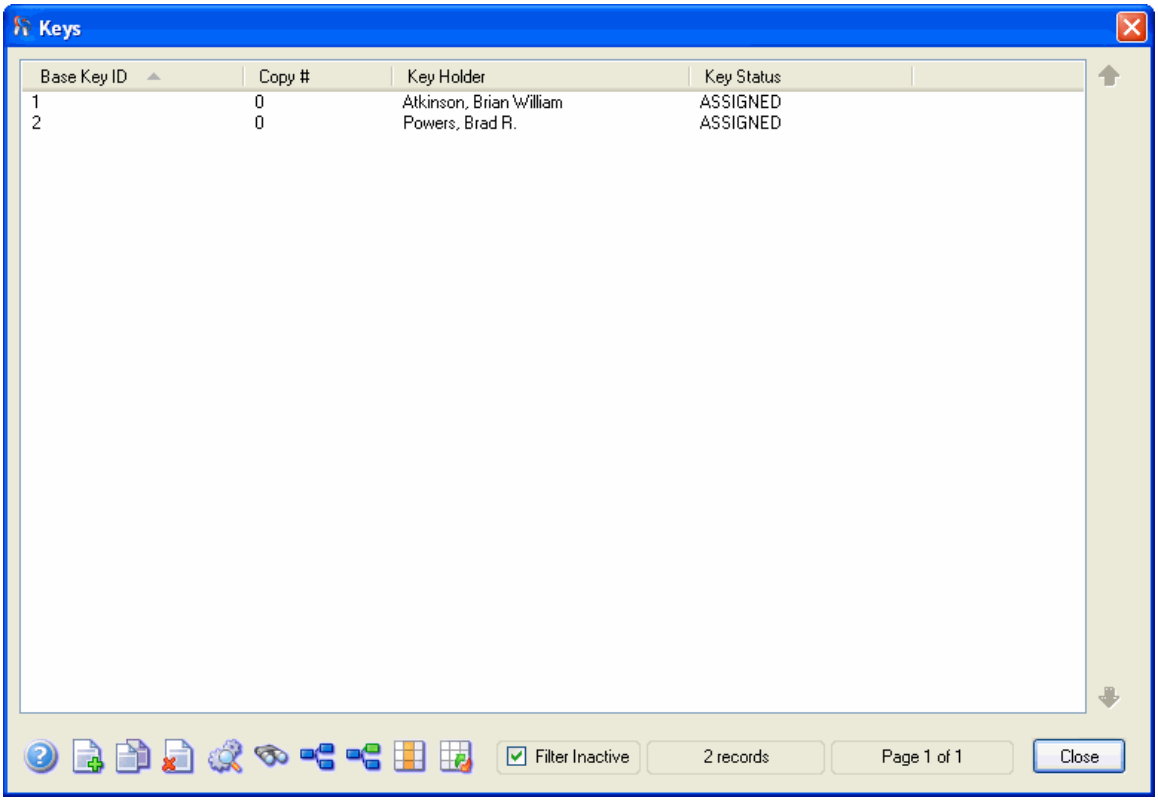
Default Output List Screen

The default Keys Output List screen shows the Base Key ID, Copy #, Key Holder, and Key Status Keys for each key record.

You can:

- Resize the columns by clicking the lines in the column headers and dragging them to the left or right, much like a spreadsheet.
- Click on a column header to sort the records by that column.

- Double-click on a record to open an input screen where you can modify the fields.



Filter Inactive
Check the **Filter Inactive** check box to prevent archived keys from appearing on this output screen.
For more information about using this screen, see:

- Output List Screen
- Customizing Output List Columns
- Finding Records Using Quick Find
- Finding Records Using Query Editor

Keys Reports

Reports Menu

For more information about the default reports that appear in every module, see:

- Standard Reports

The rest of this page describes module-specific reports.

Key Hooks Summary Report
This report prints a summary of selected key hooks.

Key Hooks Detailed Report
This report prints a detailed report of one or more selected key hooks.

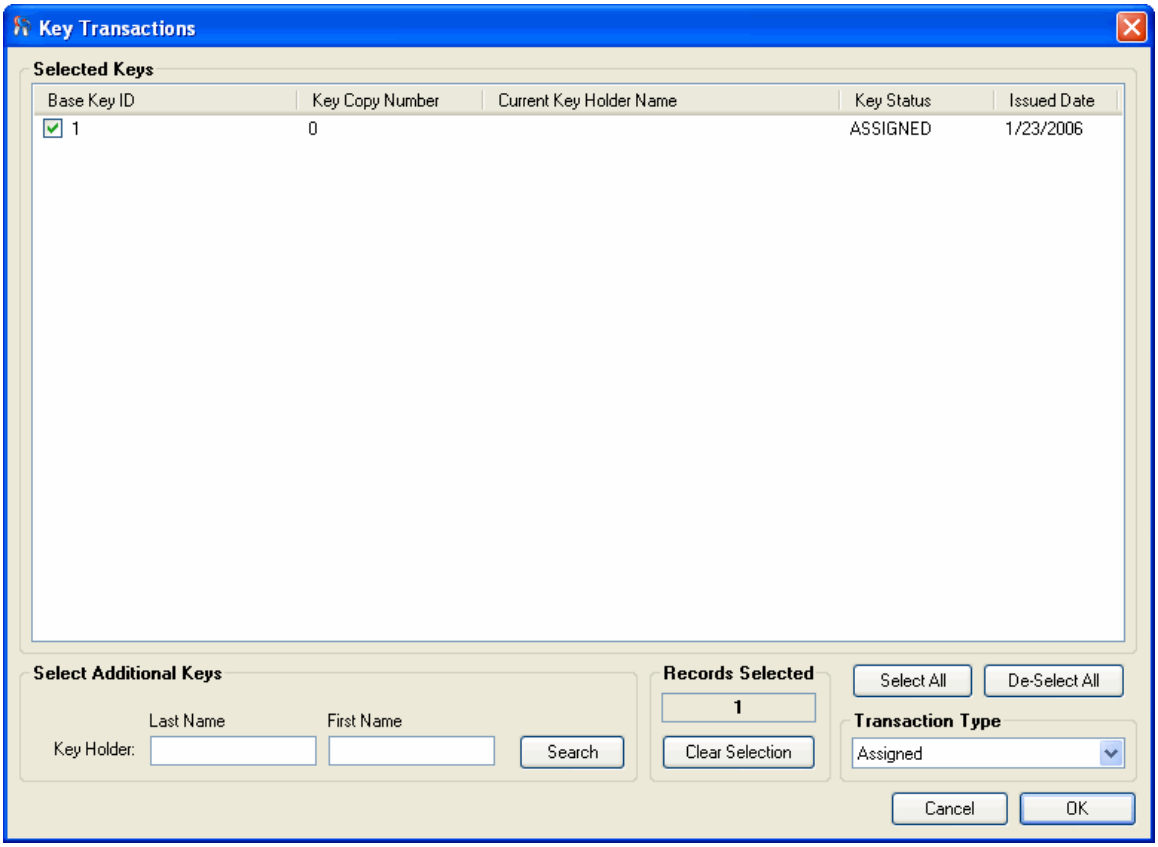
Key Rings Summary Report
This report prints a summary of selected key rings.

Key Rings Detailed Report
This report prints a detailed report of one or more selected key rings.

Keys Transactions

Keys Transactions

The Key Transactions List screen shows the Base Key ID, Copy#, Current Holder, Status, and Issued date for each key transaction record for a specified transaction type.



For more information about using this screen, see Input Screen.
Keys, Transaction Page Fields

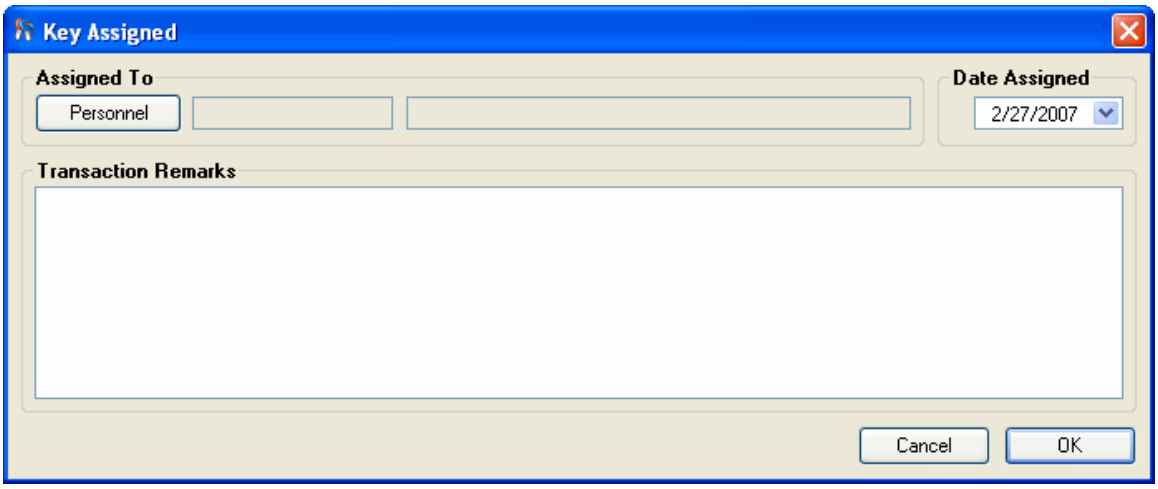
Field Name	Description
Base Key ID	The base key id field for the selected key record.
Key Copy Number	The Copy number of the key.
Current Key Holder Name	The person who is currently the Key Copy Holder.
Key Status	Current status of the Key. This value is assigned automatically when a Key Transaction is done.

Issued Date	Date the key was issued.
Search	Search for keys assigned to the key holder.
Records Selected	The number of selected records.
Transaction Type	Select the Key Transaction Type from this option menu.

Transactions
Assigned
Damaged
Destroyed
Inventoried
Loaned
Lost
Retrieved

Key Assigned

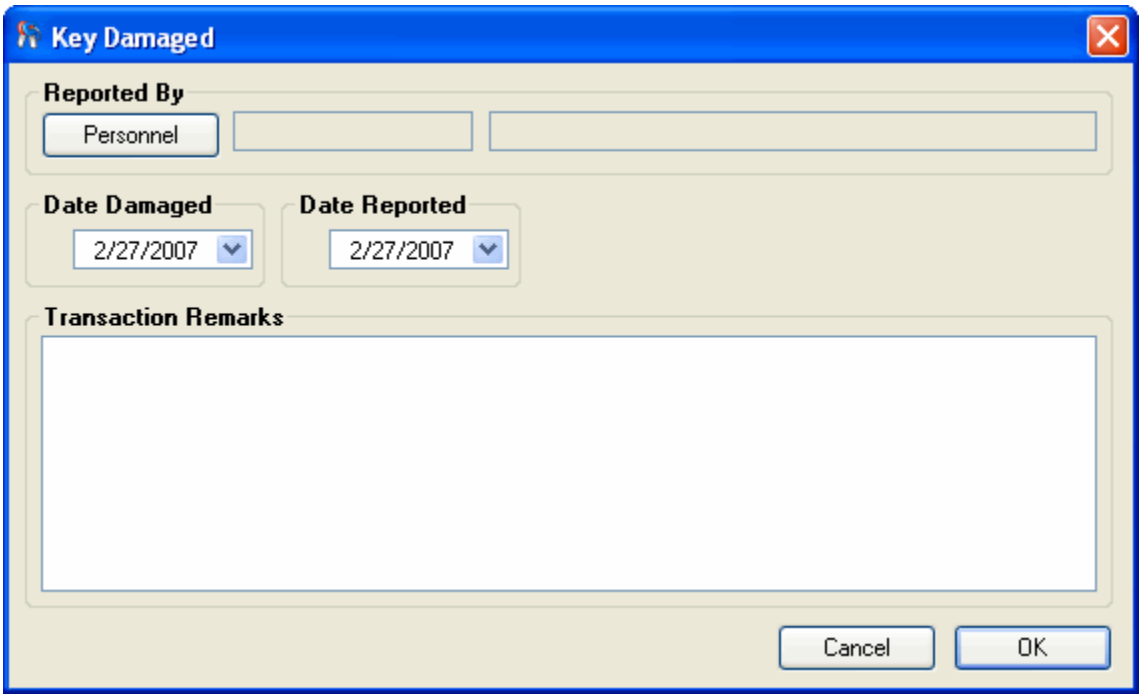
Key Assigned Transactions allows you to assign one or more keys, or a key ring or key hook to an individual in one step. A record of the assignment will be put in the history for each Key record.



Assigned To
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Assigned
Enter the date the key(s) will be assigned. The **Date Assigned** defaults to the current system date.
Click **OK** to complete the transaction.

Key Damaged

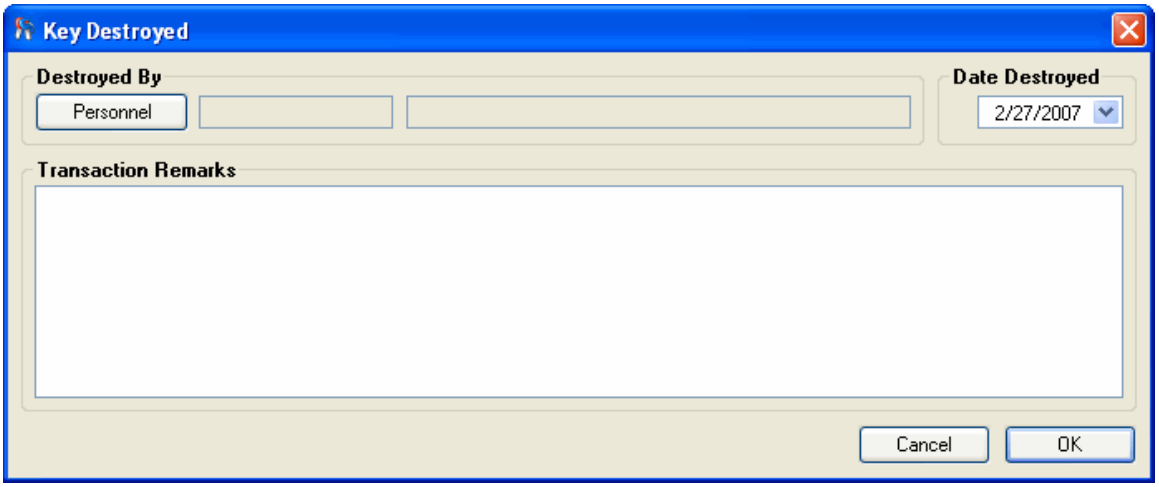
Key Damaged Transactions allows you to change the status of one or more keys, or a key ring or key hook to "Damaged" in one step. A record of the damaged key will be put in the history for each Key record.



Reported By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Damaged
Enter the date the key(s) was damaged. The **Date Damaged** defaults to the current system date.
Date Reported
Enter the date the damaged key(s) was reported. The **Date Reported** defaults to the current system date.
Click **OK** to complete the transaction.

Key Destroyed

Key Destroyed Transactions allows you to change the status of one or more keys, or a key ring or key hook to "Destroyed" in one step. A record of the destroyed key will be put in the history for each Key record.



Destroyed By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the

name will appear in the box to the right of the button.

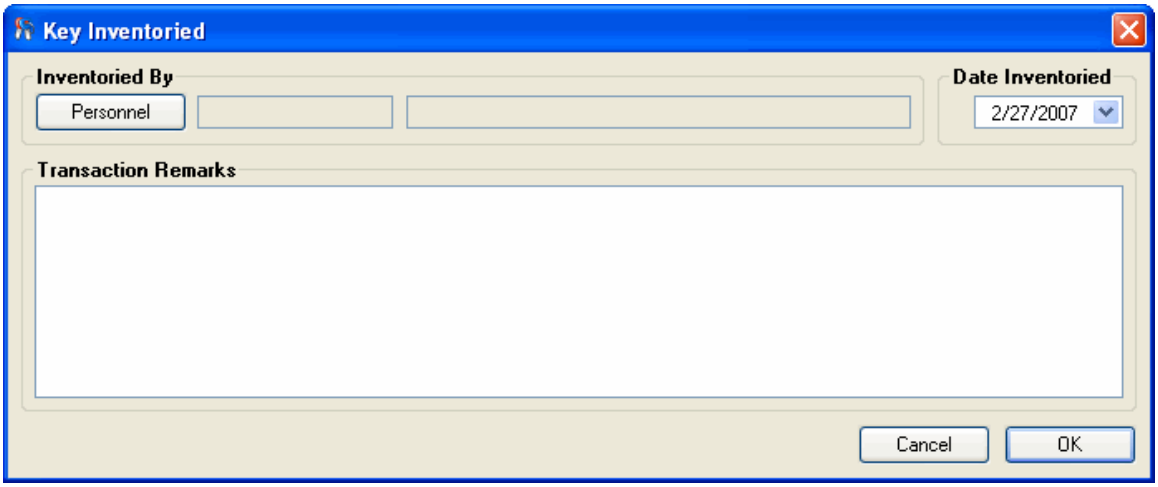
Date Destroyed

Enter in the date the key(s) was destroyed. The **Date Destroyed** defaults to the current system date.

Click **OK** to complete the transaction.

Key Inventoried

Key Inventoried Transactions allows you to change the status of one or more keys, or a key ring or key hook to "Inventoried " in one step. A record of the inventoried key will be put in the history for each Key record.



Inventoried By

Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.

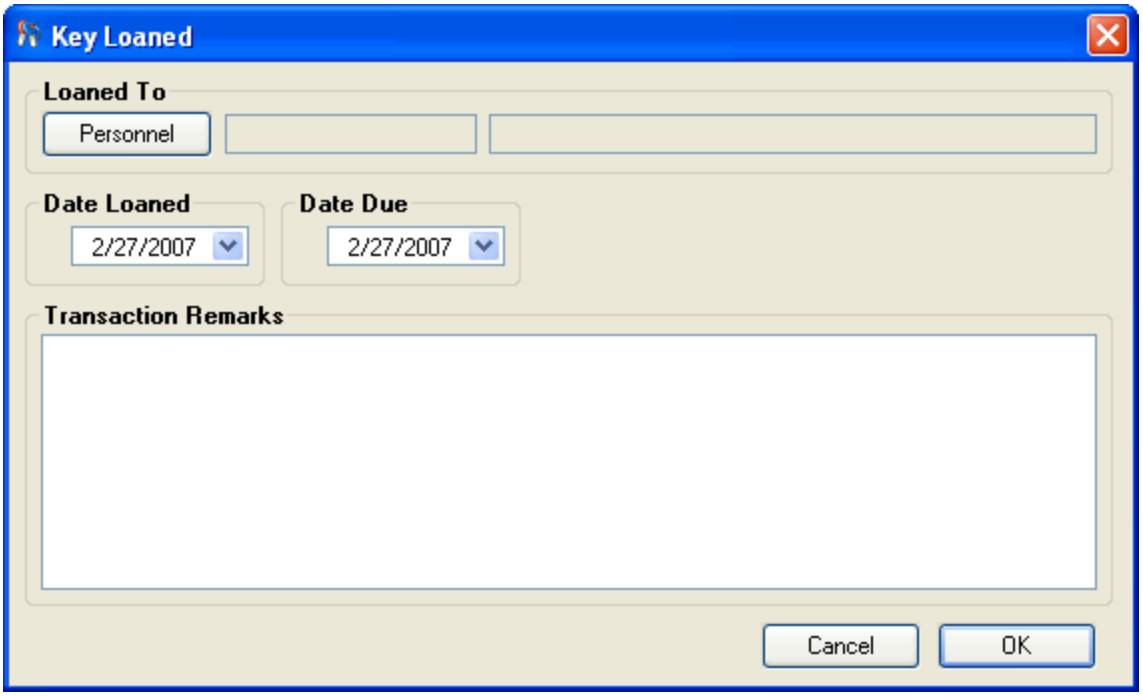
Date Inventoried

Enter the date the key(s) was inventoried. The **Date Inventoried** defaults to the current system date.

Click **OK** to complete the transaction.

Key Loaned

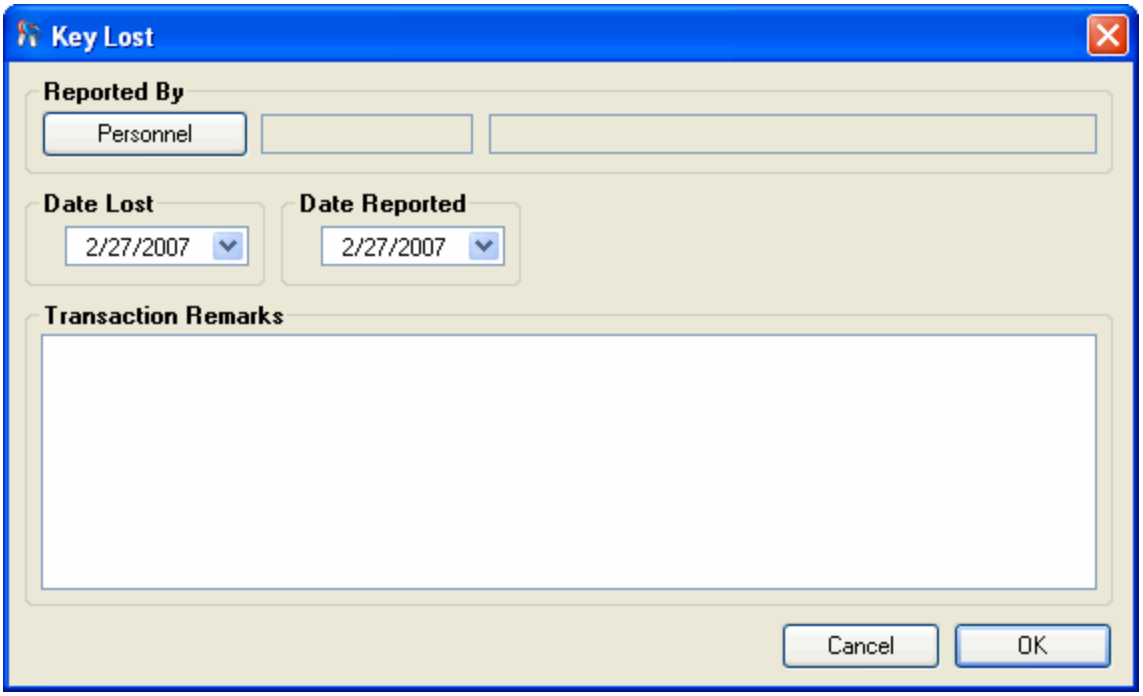
Key Loaned Transactions allows you to change the status of one or more keys, or a key ring or key hook to "Loaned " in one step. A record of the loaned key will be put in the history for each Key record.



Loaned To
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Loaned
Enter the date the key(s) was loaned. The **Date Loaned** defaults to the current system date.
Date Due
Enter the date the key(s) is due back. The **Date Due** defaults to the current system date.
Click **OK** to complete the transaction.

Key Lost

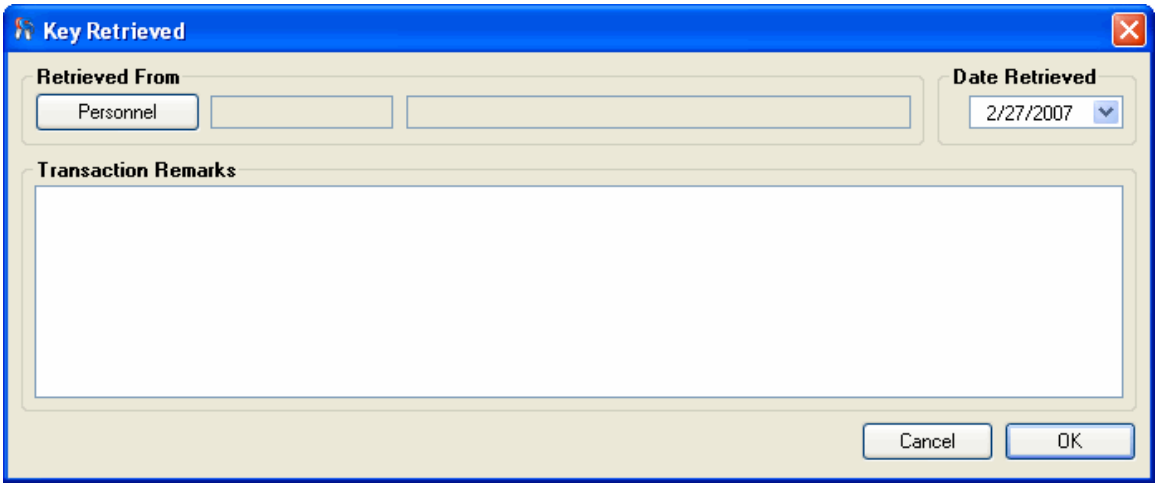
Key Lost Transactions allows you to change the status of one or more keys, or a key ring or key hook to "Lost " in one step. A record of the lost key will be put in the history for each Key record.



Reported By
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.
Date Lost
Enter the date the key(s) was lost. The **Date Lost** defaults to the current system date.
Date Reported
Enter the date the lost key(s) was reported. The **Date Reported** defaults to the current system date.
Click **OK** to complete the transaction.

Key Retrieved

Key Retrieved Transactions allows you to change the status of one or more keys, or a key ring or key hook to "Retrieved" in one step. A record of the retrieved key will be put in the history for each Key record.



Retrieved From
Click this button to open a pick list from the Cleared Personnel or Visitors module. Select the individual, and the name will appear in the box to the right of the button.

Date Retrieved
Enter the date the key(s) was retrieved. The **Date Retrieved** defaults to the current system date.
Click **OK** to complete the transaction.

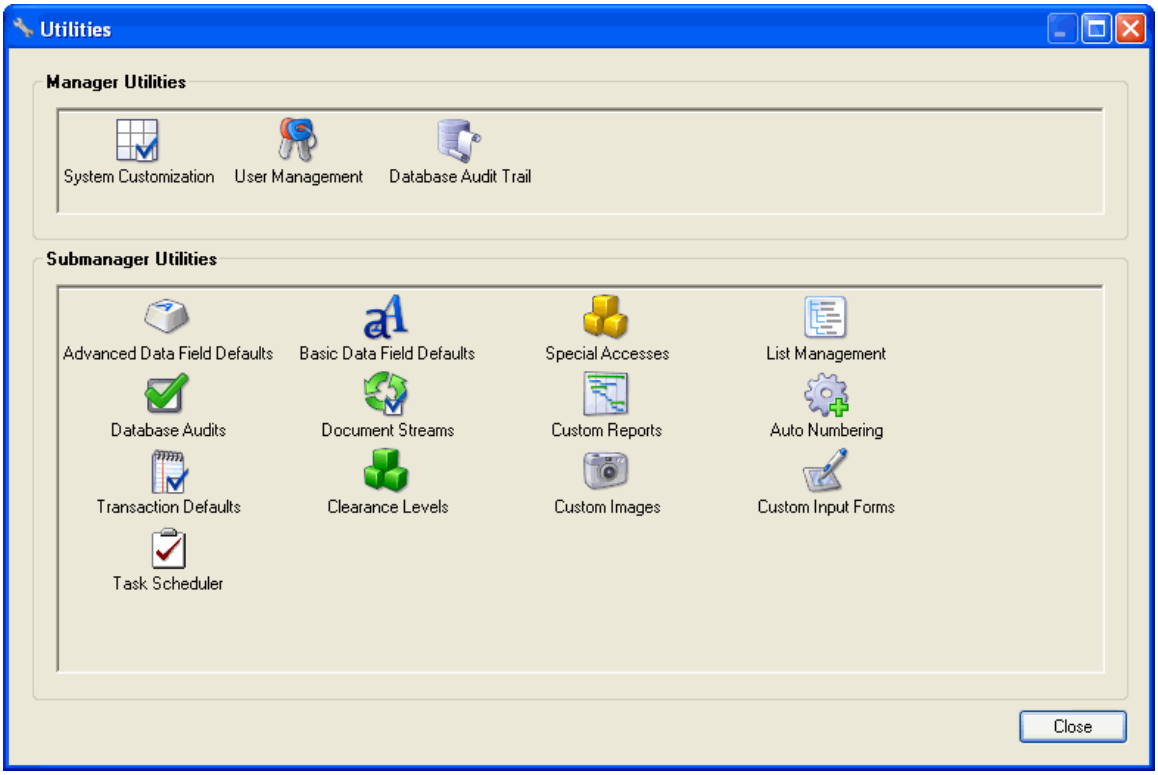
Utilities

Purpose of Utilities

The Utilities module performs the following functions:

- Customizing the software by setting various system default values
- Reminding the system manager of things that may need attention
- Adding and controlling the privileges assigned to SIMS users
- Maintaining the SIMS database

SIMS Managers have access to make changes to both Manager and Submanager utilities. In the User Management dialog, a SIMS manager can edit whether or not a Submanager will have read only access to all Manager and Submanager utilities, or read/write access to specific Submanager utilities. In the Submanager Utilities, Submanagers who have read/write access can add/edit/delete items only within their Data Group. Items outside of their Data Group are Read Only.

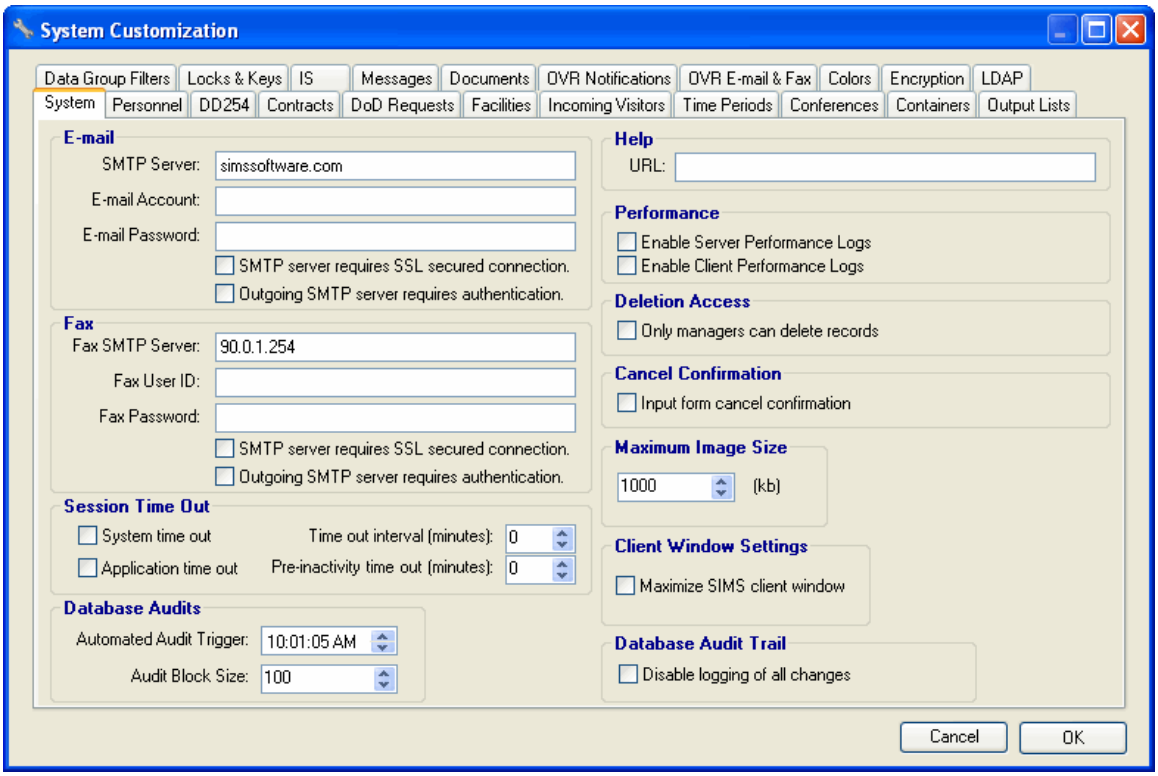


System Customization
User Management
Advanced Data Field Defaults
Basic Data Field Defaults
Special Accesses
List Management
Database Audit Trail
Document Streams
Custom Reports
Auto Numbering
Transaction Defaults
Clearance Levels

Custom Images
Custom Input Forms
Task Scheduler

System Customization

System Customization System



For more information about using this screen, see Input Screen.

System Customization, System Page Fields

Field Name	Description
SMTP Server	Specify the SMTP server.
E-mail Account	E-mail SMTP Server account/login. Example: techsupport@simssoftware.com
E-mail Password	E-mail SMTP Server password for E-mail Account.
SMTP server requires SSL secured connection	Secure Socket Layer (SSL) refers to the standard method for encryption and authentication on the Internet. This provides protection against unauthorized access to login credentials on an insecure connection. This information should be available with the system administrator or Internet Service Provider (ISP).

Outgoing SMTP server requires authentication	Some SMTP servers allow sending out emails without authentication while some SMTP servers do need authentication. This is to avoid sending out spam or unauthorized emails. This information should be available with the system administrator or Internet Service Provider (ISP).
Fax SMTP Server	Fax server used in the distribution of SIMS reports, letters and other generated documents.
Fax User ID	Fax SMTP Server user identification/login.
Fax Password	Fax SMTP Server password for Fax User ID.
System Time Out	If a value is entered into the Timeout field and the System time out option is checked, then the user will automatically be logged out of SIMS after the specified minutes of inactivity occurs on the computer. As long as there is activity on the computer within SIMS or another application, SIMS will not time out. If a zero is entered into the Timeout field, the user will not be automatically logged out.
Application Time Out	If a value is entered into the Timeout field and the Application time out option is checked, then the user will automatically be logged out of SIMS after the specified minutes of inactivity occurs using SIMS. If a zero is entered into the Timeout field, the user will not be automatically logged out.
Database Audits	Automated DB audits work according to data group. It runs every 24 hours at the time specified here. In order for this to work, you have to be logged in as a user with the DB Audit Distributor checkbox enabled.
Help	When a help icon is selected, this file or URL will be launched. If a file is specified, the application associated with the file type will be used.
Performance	Check box(es) to determine whether SIMS performance logs should be enabled.
Deletion Access	If checked, only managers and submanagers can delete records. See User Management where the user can be selected/un-selected as a manager or submanager.

Input form Cancel Confirmation	Check this box to turn on the Input Cancel confirmation dialog feature. When choosing the Cancel button after performing an edit to a record, a dialog will appear to confirm whether or not you would like to proceed with the cancel.
Maximum Image Size (kb)	Maximum database space allowed for saved photographs and signature images that appear in the Personnel and Visitor modules. The default is 1000 kb and the maximum can be adjusted up to 10000 kb.
Client Window Settings	If checked, the SIMS client window can be maximized.
Database Audit Trail	If checked, all changes in the Audit Trail records will not be logged.

Performance

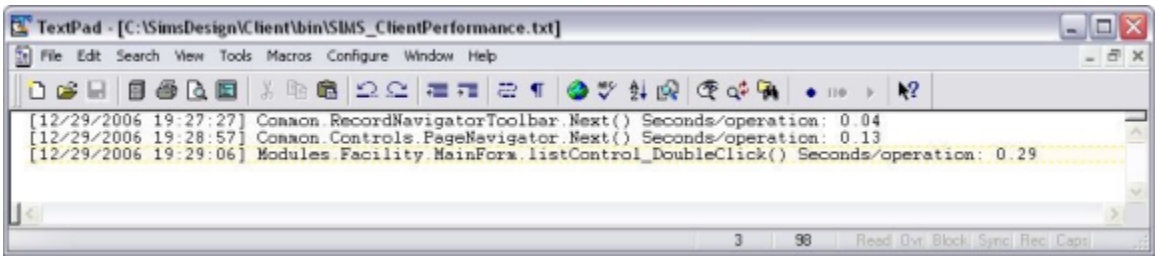
There are two ways to test SIMS: client and server. Only one can be tested at a time. Client testing measures the responsiveness of the GUI only. Server testing measures the combined responsiveness of (1) network, (2) middle tier (IIS), and (3) database (SQL). The GUI is not tested when the server option is selected.

When testing is enabled, SIMS will automatically repeat selected operations 50 times and report the results. Client testing loops on (1) opening a record, (2) selecting Next while editing a record, and (3) selecting Page Down on the output list. Server testing loops on (1) opening a record, (2) saving a record, and (3) copying a record. The client results are stored in 'SIMS_ClientPerformance.txt'. Server results are stored in 'SIMS_ServerPerformance.txt'. Both files are created in the client application startup folder.

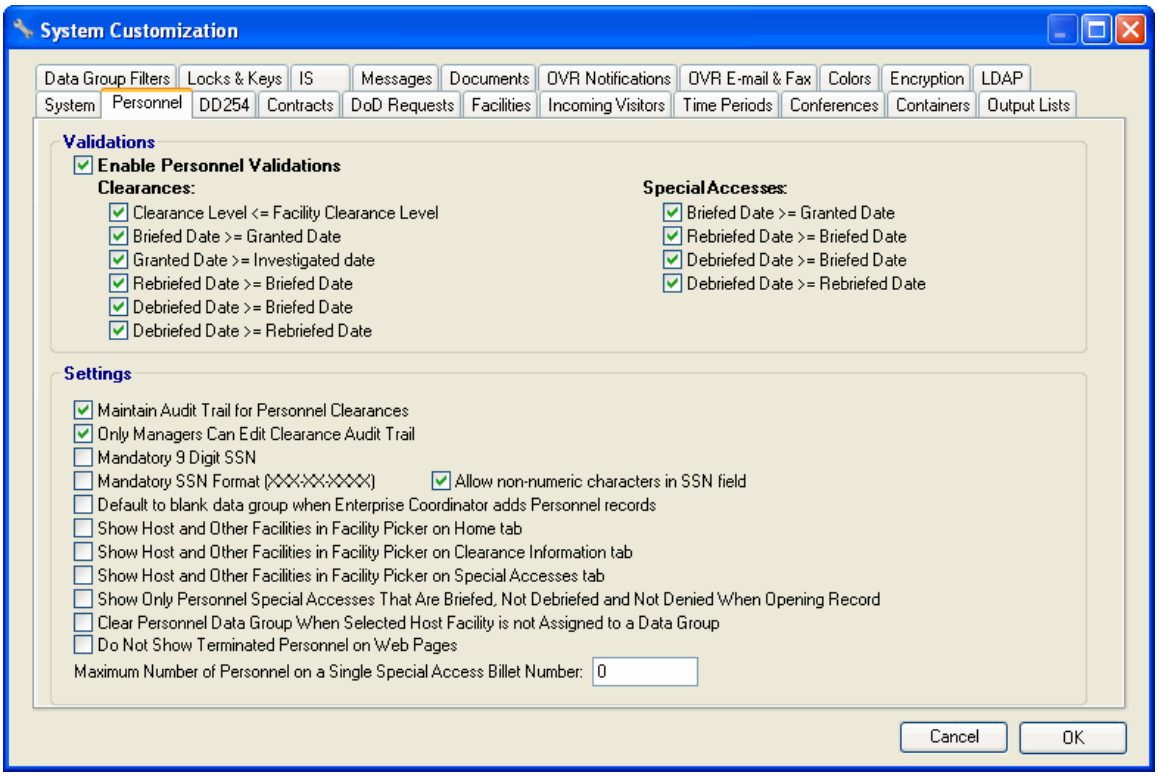
Do not enable either option on a production server.






TextPad - [C:\SimsDesign\Client\bin\SIMS_ClientPerformance.txt]
File Edit Search View Tools Macros Configure Window Help
[12/29/2006 19:27:27] Common.RecordNavigatorToolbar.Next() Seconds/operation: 0.04
[12/29/2006 19:28:57] Common.Controls.PageNavigator.Next() Seconds/operation: 0.13
[12/29/2006 19:29:06] Modules.Facility.MainForm.listControl_DoubleClick() Seconds/operation: 0.29

System Customization Personnel


System Customization
Data Group Filters
Locks & Keys
IS
Messages
Documents
OVR Notifications
OVR E-mail & Fax
Colors
Encryption
LDAP
System
Personnel
DD254
Contracts
DoD Requests
Facilities
Incoming Visitors
Time Periods
Conferences
Containers
Output Lists
Validations
Enable Personnel Validations
Clearances:
Clearance Level <= Facility Clearance Level
Briefed Date >= Granted Date
Granted Date >= Investigated date
Rebriefed Date >= Briefed Date
Debriefed Date >= Briefed Date
Debriefed Date >= Rebriefed Date
Special Accesses:
Briefed Date >= Granted Date
Rebriefed Date >= Briefed Date
Debriefed Date >= Briefed Date
Debriefed Date >= Rebriefed Date
Settings
Maintain Audit Trail for Personnel Clearances
Only Managers Can Edit Clearance Audit Trail
Mandatory 9 Digit SSN
Mandatory SSN Format (XXX-XX-XXXX)
Allow non-numeric characters in SSN field
Default to blank data group when Enterprise Coordinator adds Personnel records
Show Host and Other Facilities in Facility Picker on Home tab
Show Host and Other Facilities in Facility Picker on Clearance Information tab
Show Host and Other Facilities in Facility Picker on Special Accesses tab
Show Only Personnel Special Accesses That Are Briefed, Not Debriefed and Not Denied When Opening Record
Clear Personnel Data Group When Selected Host Facility is not Assigned to a Data Group
Do Not Show Terminated Personnel on Web Pages
Maximum Number of Personnel on a Single Special Access Billet Number:
0
Cancel
OK

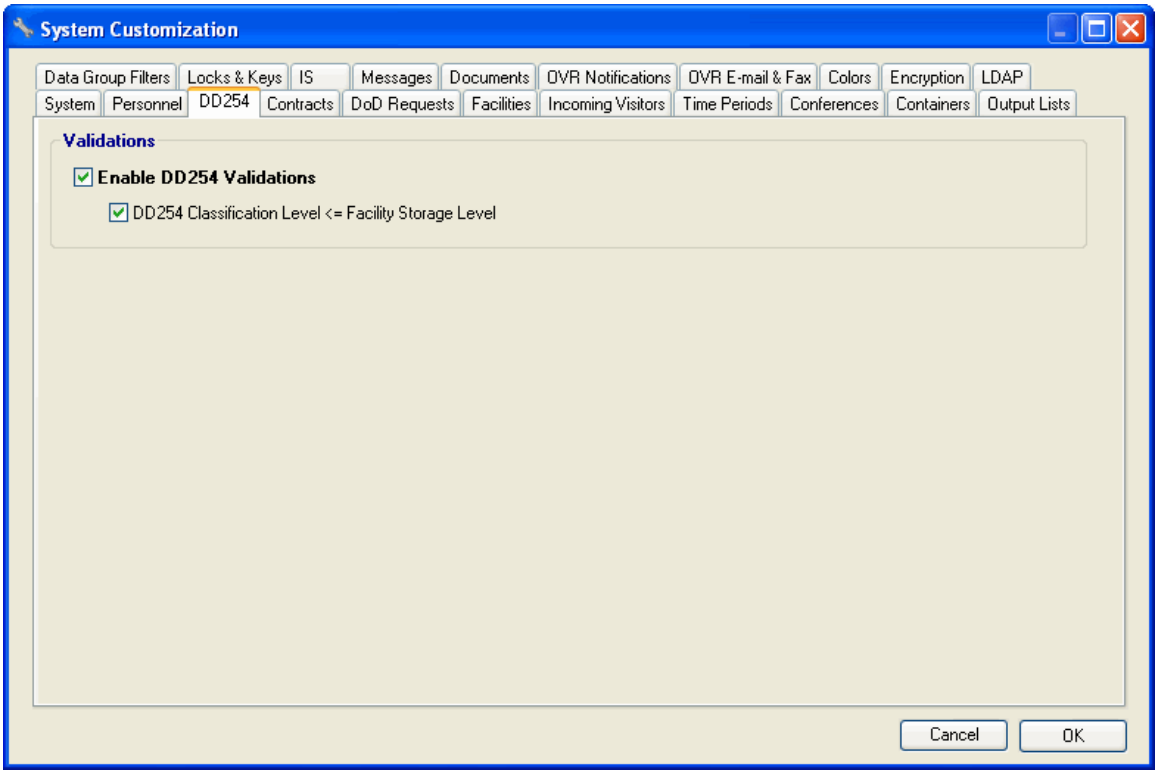
For more information about using this screen, see Input Screen.

System Customization, Personnel Page Fields

Field Name	Description
Enable Personnel Validations	If checked, enables personnel clearance validations that are checked below.

Clearance Level <= Facility Clearance Level	If checked, the rank of a person's clearance level must be less than or equal to the rank of the person's facility clearance level.
Briefed Date >= Granted Date	If checked, a person's briefed date must be greater than or equal to the person's granted date.
Granted Date >= Investigated	If checked, the person's granted date must be greater than or equal to the person's investigation date.
Rebriefed Date >= Briefed Date	If checked, the person's rebriefed date must be greater than or equal to the person's briefed date.
Debriefed Date >= Briefed Date	If checked, the person's debriefed date must be greater than or equal to the person's briefed date.
Debriefed Date >= Rebriefed Date	If checked, the person's debriefed date must be greater than or equal to the person's rebriefed date.
Special Accesses - Briefed Date >= Granted Date	If checked, the person's special access briefed date must be greater than or equal to the person's special access granted date.
Special Accesses - Rebriefed Date >= Briefed Date	If checked, the person's special access rebriefed date must be greater than or equal to the person's special access briefed date.
Special Accesses - Debriefed Date >= Briefed Date	If checked, the person's special access debriefed date must be greater than or equal to the person's special access briefed date.
Special Accesses - Debriefed Date >= Rebriefed Date	If checked, the person's special access debriefed date must be greater than or equal to the person's special access rebriefed date.
Settings	These check boxes set Personnel parameters when enabled.
Maximum number of personnel on a single special access billet number	Indicates the maximum number of personnel allowed on a single special access billet number.

System Customization DD254

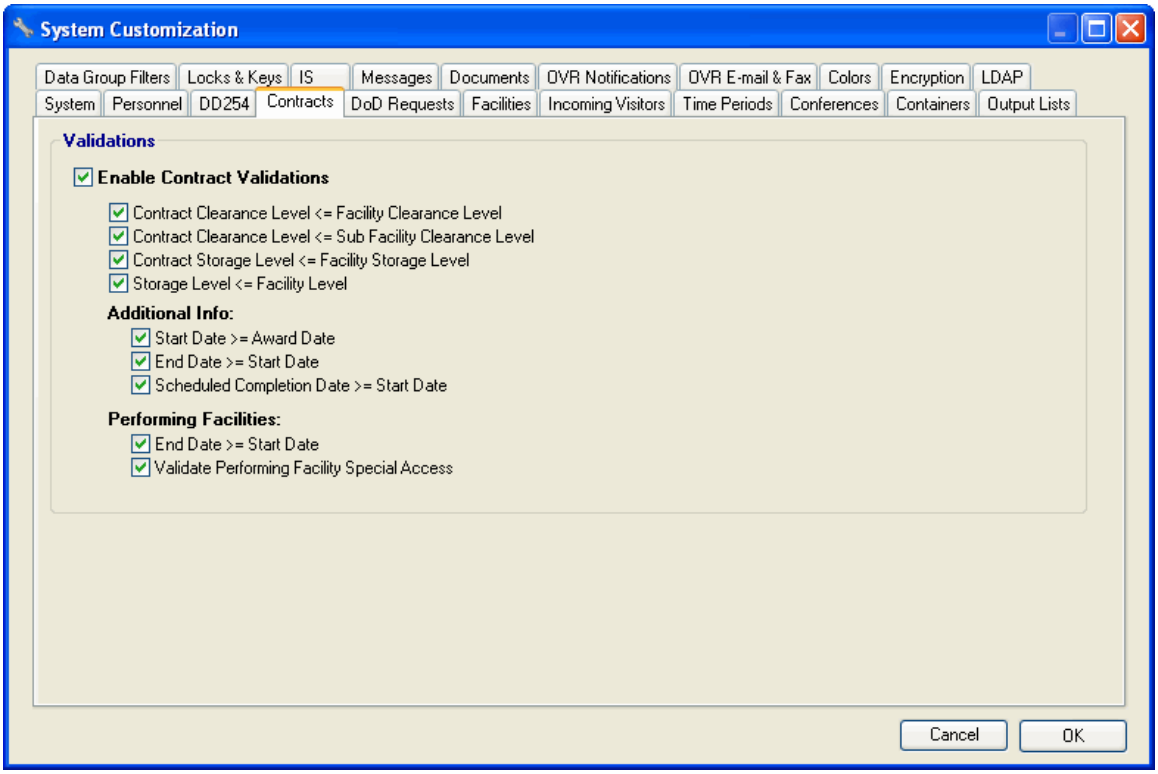


For more information about using this screen, see Input Screen.

System Customization, DD254 Page Fields

Field Name	Description
Enable DD254 Validations	If checked, enables DD254 validation that is enabled below.
DD254 Classification Level <= Facility Storage Level	If checked, the DD254 classification level must be less than or equal to the facility storage level.

System Customization Contracts



For more information about using this screen, see Input Screen.

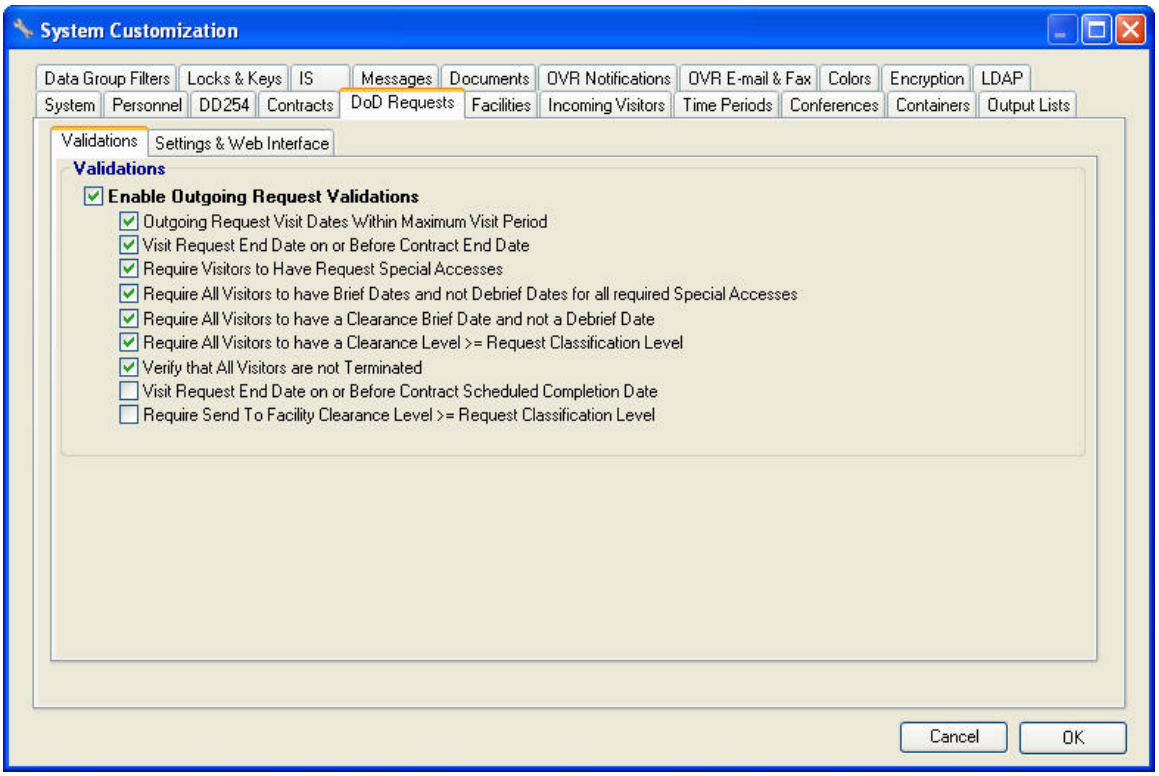
System Customization, Contracts Page Fields

Field Name	Description
Enable Contract Validations	If checked, enables the contract checks that are enabled below.
Contract Clearance Level <= Facility Clearance Level	If checked, the rank of a contract's clearance level must be less than or equal to the rank of the contract's facility clearance level.
Contract Clearance Level <= Sub Facility Clearance Level	If checked, the rank of a contract's clearance level must be less than or equal to the rank of the contract's sub facility clearance level.
Contract Storage Level <= Facility Storage Level	If checked, the rank of a contract's storage level must be less than or equal to the rank of the contract's facility storage level.
Storage Level <= Facility Level	If checked, the rank of a contract's storage level must be less than or equal to the rank of the contract's facility clearance level.
Start Date >= Award Date	If checked, the start date must be later than or equal to the specified award date.

End Date >= Start Date	If checked, the end date must be later than or equal to the specified start date.
Scheduled Completion Date >= Start Date	If checked, the scheduled completion date must be later than or equal to the specified award date.
End Date >= Start Date	If checked, the end date for the performing facility must be later than or equal to the specified start date.
Validate Performing Facility Special Access	If checked, any special accesses identified for the contract must also be identified for each Performing Facilities.

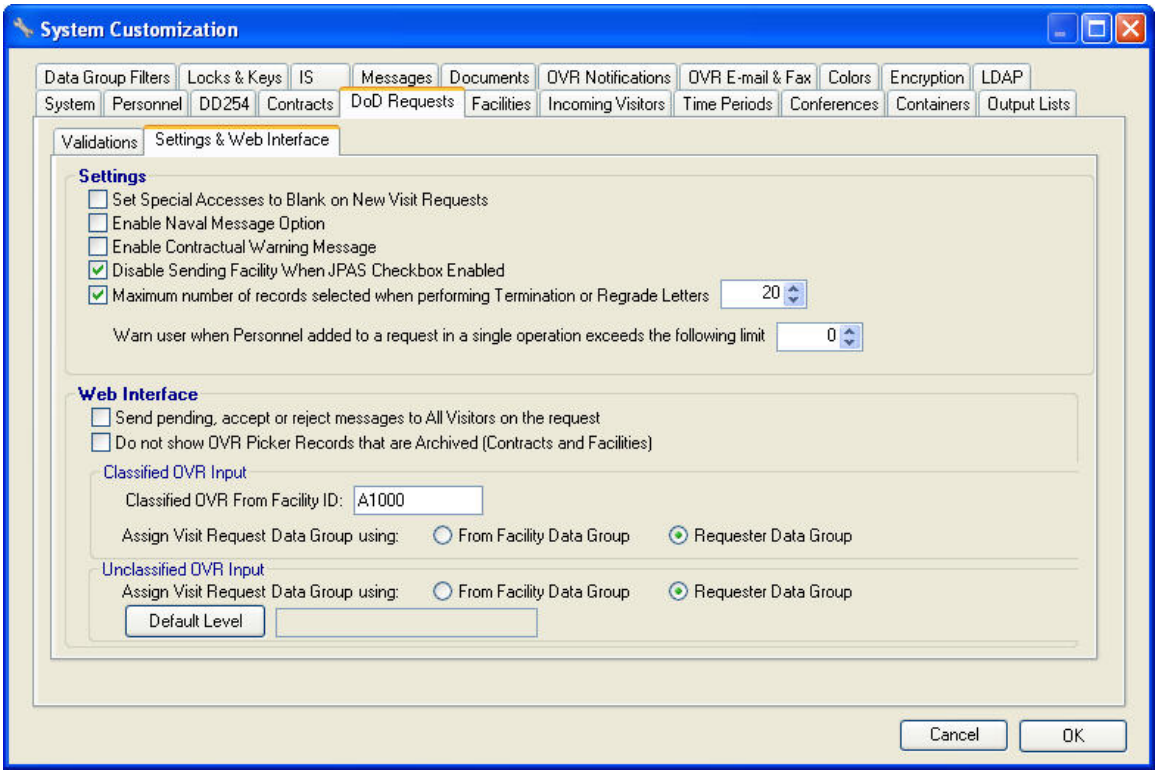
System Customization DoD Outgoing Requests

This tab contains validation information for DoD Outgoing Requests and maintains settings for enabling message options and special access. It also contains the E-mail and Fac subject, message and cover page information for implementation of the Visit Request Administrator (VR Admin User) feature. The VR Admin User capability allows personnel to submit requests for DoD Outgoing Requests to be processed and faxed, using a web-based interface to SIMS. A designated VR Admin User (see User Management Utility) is periodically advised of pending requests that can then be accepted and faxed to the facility to be visited or rejected and bounced back to the requestor for modification or correction.



For more information about using this screen, see Input Screen.
System Customization, DoD Outgoing Requests Page Fields

Field Name	Description
Enable Outgoing Request Validations	If checked, enables validations that are enabled below.
Outgoing Request Visit Dates Within Maximum Visit Period	If checked, verify outgoing visit request date range defined by the valid from and to dates does not exceed the maximum time period defined in System Settings.
Visit Request End Date on or before Contract End Date	If checked, verify outgoing visit request end date does not exceed the Contract's End Date (if applicable).
Require Visitors to Have Request Special Accesses	If checked, verify outgoing visitors have appropriate special access.
Require All Visitors to have Brief Dates and not Debrief Dates for all required Special Accesses	If checked, all visitors must have a brief date and not a debrief date for special accesses that are required for the visit request.
Require All Visitors to have a Clearance Brief Date and not a Debrief Date	If checked, all visitors must have a brief date and not a debrief date for their clearances.
Verify that All Visitors are Terminated	If checked, the visitor must not have been terminated.
Visit Request End Date on or Before Contract Scheduled Completion Date	If checked, the DoD record's End Date must be on or before the Contract Scheduled Completion Date. The validation is applied when creating DoD visit requests from the Windows or web clients.
Require Send To Facility Clearance Level >= Request Classification Level	If checked, the rank of the Send To Facility Clearance Level must be greater than or equal to the rank of the DoD Request Classification Level. The validation is applied when creating DoD visit requests from the Windows or web clients.



For more information about using this screen, see Input Screen.

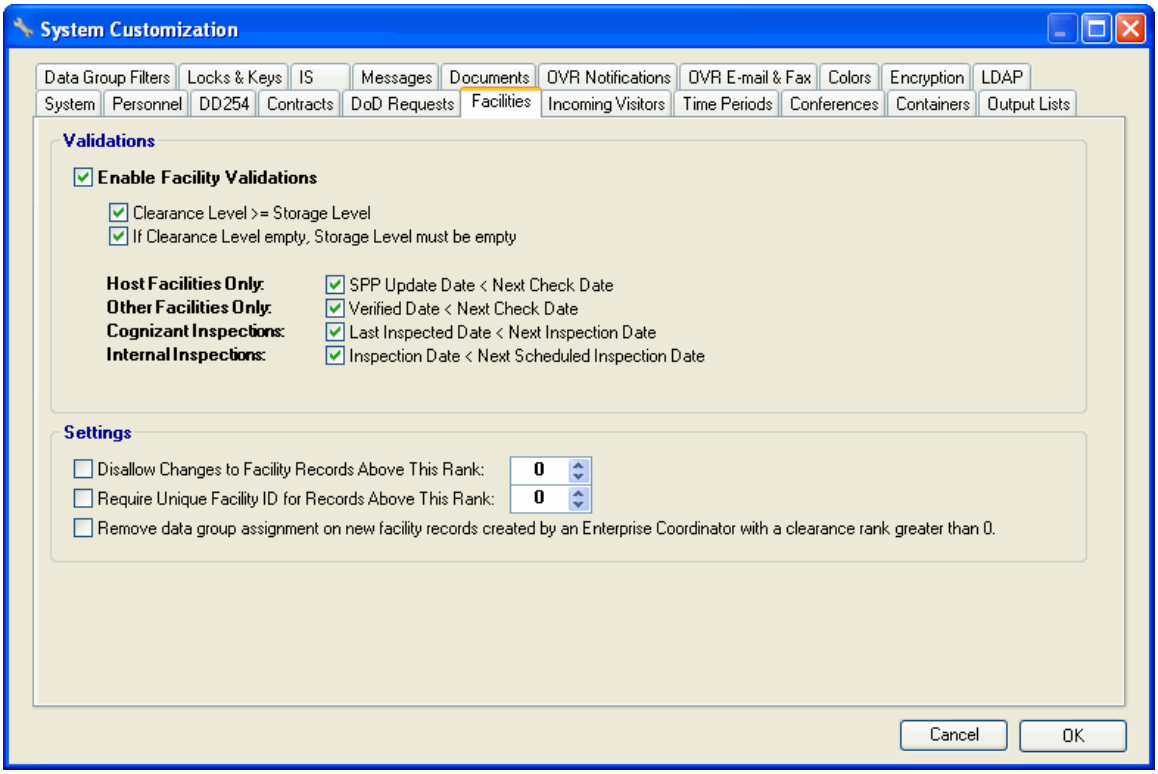
System Customization, DoD Outgoing Requests Page Fields

Field Name	Description
Set Special Access to Blank on New Visit Requests	When adding visitors to an outgoing visit request, set their special access fields to blank within the request record. If unchecked, all of the currently briefed accesses in the visitor's personnel record are mapped over to the request record.
Enable Naval Message Option	If checked, the DoD input home page will display a Naval Message checkbox. If checked, Info Precedence and Action Precedence can be modified by using a pick list. Also, in the DoD Detail Report dialog, naval messaging will appear as a report format.
Enable Contractual Warning Message	When opening a DoD record which has the Contractual check box unchecked, a warning message will appear when this option is checked. If this option is unchecked, the warning message will not appear.

Disable Sending Facility When JPAS Checkbox Enabled	This option affects the Windows client and the OVR input web page. This allows customers to choose whether or not facility information will be specified if a request has the 'JPAS' enabled on the Home tab of the DoD request input form. If checked and the 'JPAS' field in the DoD input form is enabled, the 'Send to Facility' tab will be disabled so that users will not be able to populate it.
Maximum number of records selected when performing Termination or Regrade Letters	If checked, the maximum number of records that is specified can be selected when performing a Termination or Regrade Letter.
Warn user when Personnel added to a single operation exceeds the following limit	When the limit of Personnel is past the specified limit, a warning will appear.
Send pending, accept or reject messages to All Visitors on the request	If checked, pending, accept, or reject e-mail messages will be sent to all visitors on the request.
Do not show OVR Picker Records that are Archived (Contracts and Facilities)	When checked, the contract and facility record pick lists will only display active records available for the Classified Visit Request record submitted with a web browser.
Classified OVR From Facility ID	The Facility ID entered here is what will appear as the "From Facility" when a Classified Outgoing Visit Request (OVR) is submitted with the Web browser page to a Visit Request Administrator in SIMS.
Classified OVR From Facility ID - Assign Visit Request Data Group using	Specify whether the Facility data group or the requester data group should be used when assigning the data group to a Classified Visit Request via a Web browser.
Unclassified OVR From Facility ID - Assign Visit Request Data Group using	Specify whether the Facility data group or the requester data group should be used when assigning the data group to a Unclassified Visit Request via a Web browser.

System Customization Facilities

This tab enables facility validations by regulating clearance level, storage level, rank privileges, facility type, and inspection characteristics.



For more information about using this screen, see Input Screen.

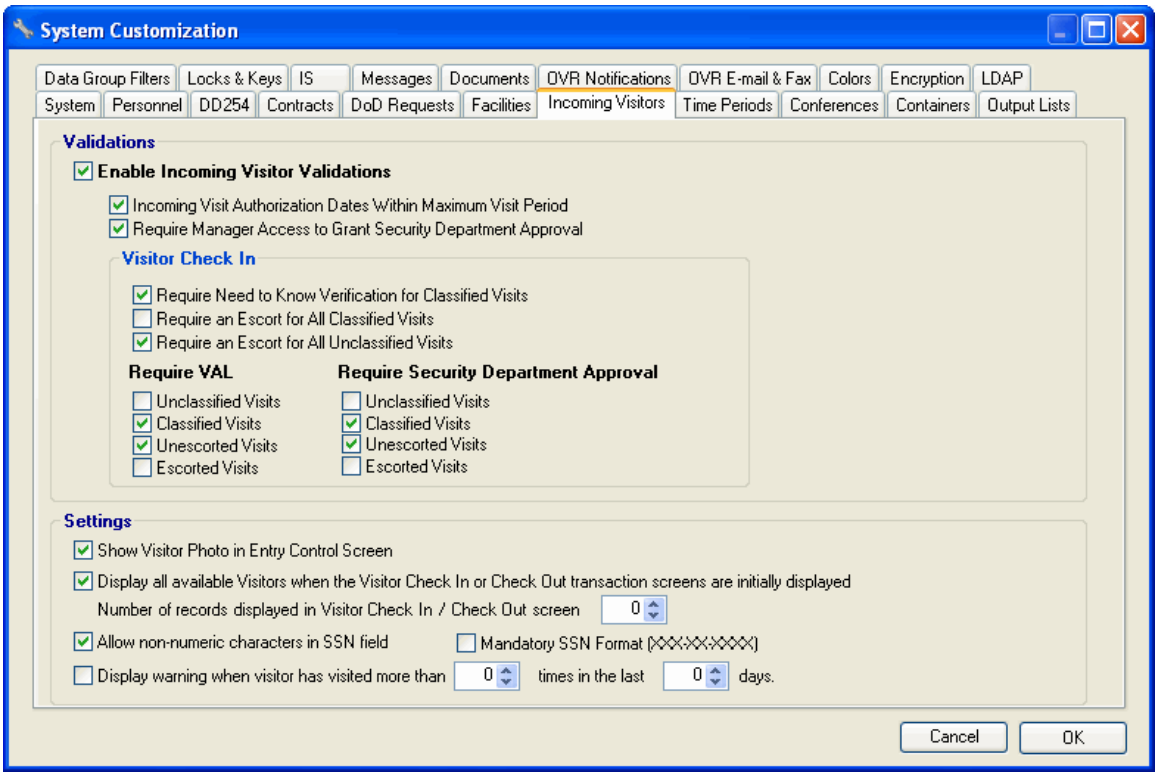
System Customization, Facilities Page Fields

Field Name	Description
Enable Facility Validations	If checked, enables validations that are enabled below.
Clearance Level >= Storage Level	If checked, the rank of a facility's clearance level must be greater than or equal to the rank of the facility's storage level.
If Clearance Level empty, Storage Level must be empty	If checked, the facility's clearance level must be empty if the facility's storage level is empty.
SPP Update < Next Check Date	If checked, the facility's SPP Date level must be less than the Next Check Date. See the Host Facility Home Page.
Verified Date < Next Check Date	If checked, the facility's Verified Date level must be less than the Next Check Date. See the Other Facility Home Page.
Inspection Date < Next Scheduled Inspection Date	If checked, the Inspection Date must be less than the Next Scheduled Inspection Date.

Disallow Changes to Facility Records Above this Rank:	Check if you want to prevent Host or Other Facility records from being added or modified above a particular Clearance Level. The rank is related to the Clearance Level as specified in the Utilities > Clearance Level Definitions.
Require Unique Facility ID by Data Group for Records Above This Rank	Check if you want to prevent Host or Other Facility records from being added or copied with a duplicate Facility ID above a particular Clearance Level. The rank is related to the Clearance Level as specified in the Utilities> Clearance Level Definitions.
Remove data group assignment on new facility records created by an Enterprise Coordinator with a clearance rank greater than 0.	If checked, this option is applied when an Enterprise Coordinator is saving a new host facility record that has a clearance rank greater than 0. When choosing to save the host facility record, a dialog will appear letting the Enterprise Coordinator know that the data group when be removed.

System Customization Incoming Visitors

This tab validates the appropriate authorizations and requirements for incoming visitors. The **Settings** check boxes near the bottom of the screen allow for further parameters on incoming visitors such as the display of a visitor photo and the display of all visits not yet checked on the entry control screen.



For more information about using this screen, see Input Screen.

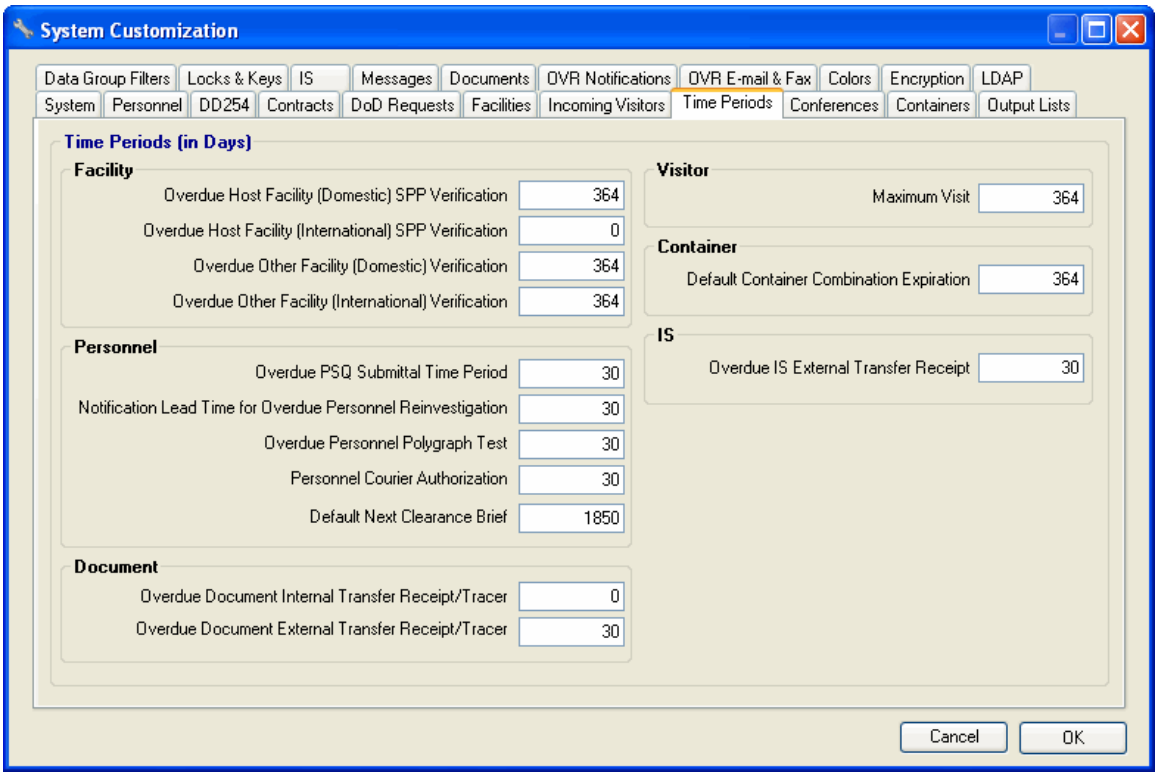
System Customization, Incoming Visitors Page Fields

Field Name	Description
Enable Incoming Visitor Validations	If checked, enables incoming visitor validations that are enabled below.
Incoming Visit Authorization Dates Within Maximum Visit Period	If checked, verify visitor date range defined by the valid from and to dates does not exceed the maximum time period defined in the System Customization Utility.
Require Manager Access to Grant Security Department Approval	If checked, Security Department Approval can only be granted by SIMS users with Manager access.
Require Need To Know Verification For Classified Visits	If checked, do not allow a visitor to be checked in for a classified visit unless the Need To Know has been checked in the Visit Authorization Visitor record.
Require an Escort For All Classified Visits	If checked, do not allow a visitor to be checked in for a classified visit unless the Need To Know has been checked in the Visit Authorization Visitor record.
Require an Escort For All Unclassified Visits	If checked, and the Visit Authorization is not marked as a Classified Visit, then the Escort Required will be checked for the visitor(s) on the Authorization.
Require a Visit Authorization Record	Check the types of visits to your facility that require a Visit Authorization.
Require a Security Department Approval	Check the types of visits to your facility that require Security Department Approval.
Show visitor photo in the entry control screen	If checked, the visitor photo is shown on the entry control screen.
Display all available Visitors when the Visitor Check In or Check Out transaction screens are initially displayed	If checked, all available visitors will be displayed when the Visitor Check In or Check Out screens are first displayed.
Number of records displayed in Visitor Check in / Check Out screen	When viewing the Visitor Check In and Check Out screens, specify the number of visitor records that will be displayed when completing a search.
Allow non-numeric characters in SSN field	If checked, non-numeric characters can be saved in the SSN field that appears in the Home tab of a personnel record.
Mandatory SSN format (XXX-XX-XXXX)	If checked, the format for the SSN field must be in the format XXX-XX-XXXX.

Display warning when visitor has visited more than X times in the last Y days	The user will be notified during a check-iin transaction if the visitor has visited more than X times in the last Y days.

System Customization Time Periods

The System Customization Time Periods default to values, in days, that are typical for most security operations. They are used to perform on-line validations as records are added, modified and saved, if the appropriate validation check boxes are checked. The number of days will take into account the system's calendar year.



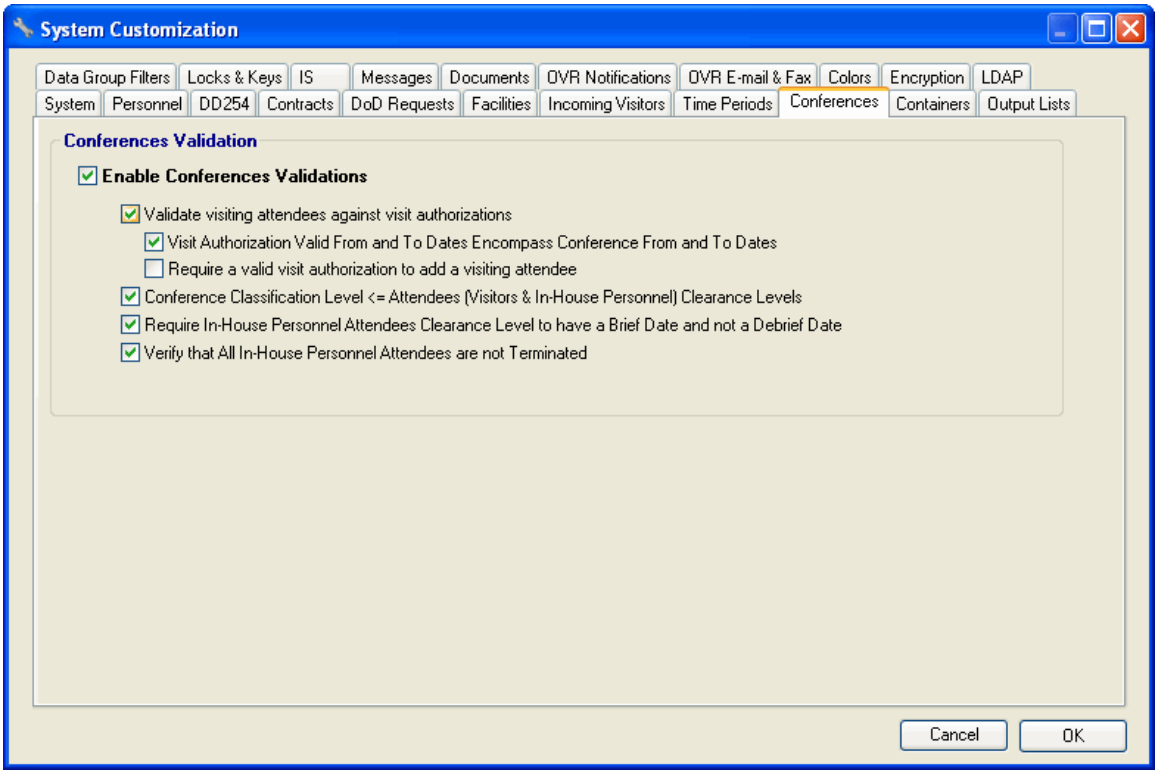
For more information about using this screen, see Input Screen.

System Customization, Time Periods Page Fields

Field Name	Description
Overdue Host Facility (Domestic) SPP Verification	Verification is overdue in the number of days specified.
Overdue Other Facility (Domestic) Verification	Verification is overdue in the number of days specified.
Overdue Other Facility (International) Verification	Verification is overdue in the number of days specified.
Overdue PSQ Submittal Time Period	Submittal is overdue in the number of days specified. Default is 30 days.

Notification Lead Time for Overdue Personnel Reinvestigation	The value in Utilities, System Customization -> Time Periods tab -> Personnel section -> 'Notification Lead Time for Overdue Personnel Reinvestigation' (henceforth 'Lead Time') is compared to the Utilities -> Clearance Levels -> 'Reinvestigation Period', for the selected Clearance Level in the person's Clearance Case. If the 'Reinvestigation Period' is greater than the 'Lead Time'', the 'Reinvestigation Date' should be changed to be equal to the 'Investigation Date', plus the 'Reinvestigation Period', minus the 'Lead Time'. If the 'Reinvestigation Period' is less than or equal to the 'Lead Time'', the 'Reinvestigation Date' will not change.
Overdue Personnel Polygraph Test	Polygraph test is overdue in the number of days specified. Default is 30 days.
Personnel Courier Authorization	Authorization is overdue in the number of days specified. Default is 30 days.
Default Next Clearance Brief	Brief is due in the number of days specified.
Overdue Document Internal Transfer Receipt/Tracer	Document Internal Transfer Receipt is overdue in the number of days specified.
Overdue Document External Transfer Receipt/Tracer	Document External Transfer Receipt is overdue in the number of days specified.
Maximum Visit	Maximum number of visit days. Default is 364 days.
Default Container Combination Expiration	Number of days between expirations. Default is 364 days.

System Customization Conferences



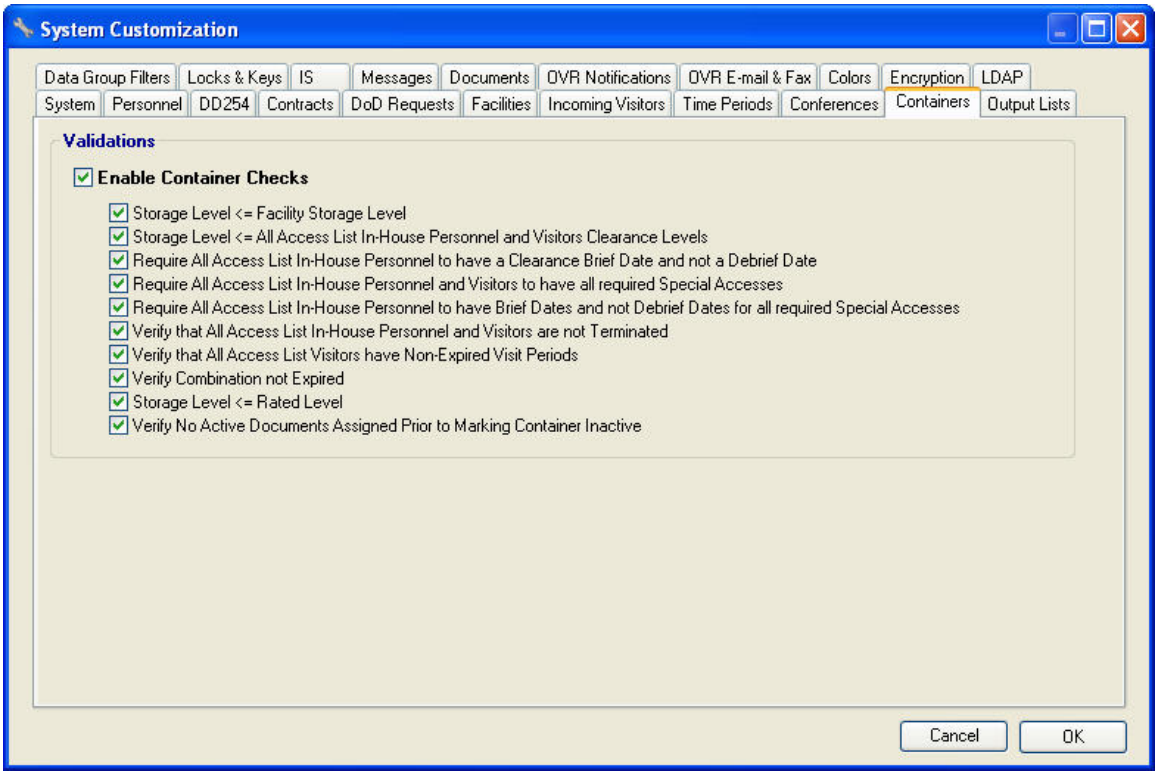
For more information about using this screen, see Input Screen.

System Customization, Conferences Page Fields

Field Name	Description
Enable Conferences Validations	If checked, enables incoming conference validations that are enabled below.
Validate visiting attendees against visit authorizations	If checked, enables the following validations: Visit Authorization Valid From To Dates Encompass Conference From To Dates Require a valid visit authorization to add a visiting attendee
Visit Authorization Valid From To Dates Encompass Conference From To Dates	If checked, the attendees' valid visit authorization from and to dates must occur between the conference from to dates.
Require a valid visit authorization to add a visiting attendee	If checked, a Visitor must have a valid Visit Authorization on file at the time of the Conference to attend.
Conference Classification Level <= Attendees (Visitor & In-House Personnel) Clearance Levels	If checked, the conferences classification level must be less than or equal to the attendee's clearance level.
Require In-House Personnel Attendees Clearance Level to have a Brief Date and not a Debrief Date	If checked, an In-House Personnel Attendee's clearance level must have a brief date. It cannot have a debrief date.

Verify that All In-House Personnel Attendees are not Terminated	If checked, the attendee cannot be terminated In-House Personnel.

System Customization Secure Containers


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Documents
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OVR E-mail & Fax
Colors
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DD254
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DoD Requests
Facilities
Incoming Visitors
Time Periods
Conferences
Containers
Output Lists
Validations
Enable Container Checks
Storage Level <= Facility Storage Level
Storage Level <= All Access List In-House Personnel and Visitors Clearance Levels
Require All Access List In-House Personnel to have a Clearance Brief Date and not a Debrief Date
Require All Access List In-House Personnel and Visitors to have all required Special Accesses
Require All Access List In-House Personnel to have Brief Dates and not Debrief Dates for all required Special Accesses
Verify that All Access List In-House Personnel and Visitors are not Terminated
Verify that All Access List Visitors have Non-Expired Visit Periods
Verify Combination not Expired
Storage Level <= Rated Level
Verify No Active Documents Assigned Prior to Marking Container Inactive
Cancel
OK

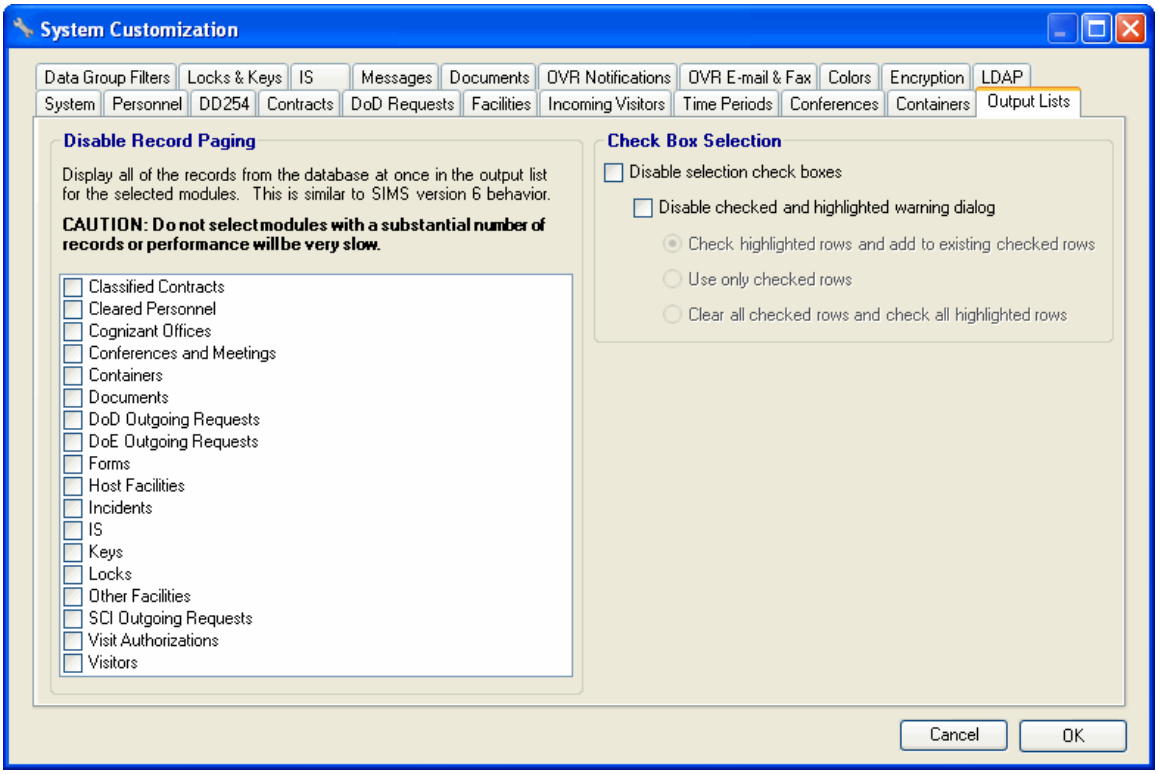
For more information about using this screen, see Input Screen.

System Customization, Containers Page Fields

Field Name	Description
Enable Container Checks	If checked, enables container checks that are enabled below.
Storage Level <= Facility Storage Level	If checked, the rank of a container's storage level must be less than or equal to the rank of the container's facility storage level.
Storage Level <= All Access List In-House Personnel and Visitor Clearance Levels	If checked, verify that all in-house personnel identified on the container's access list have current clearances with a rank that is greater than or equal to the storage level the container.

Require All Access list In-House Personnel to have a Clearance Brief Date and not a Debrief Date	If checked, verify that all in-house personnel identified on the container's access list have a clearance with a brief date, and not a debrief date.
Require All Access List In-House Personnel and Visitors to have all required Special Accesses	If checked, verify that all in-house personnel and visitors identified on the container's access list have all special accesses that belong to the secured container.
Require All Access List In-House Personnel to have Brief Dates and not Debrief Dates for all required Special Accesses	If checked, verify that all in-house personnel identified on the container's access list have all special accesses that belong to the secured container. The special accesses must have a brief date, and no debrief dates.
Verify that All Access List In-House Personnel are not Terminated	If checked, verify that all in-house personnel identified on the container's access have not been terminated.
Verify that all Access List Visitors have Non-Expired Visit Authorizations	If checked, verify that all list visitors identified on the container's access do not have an expired visit authorization.
Verify Combination not Expired	If checked, verify that the combination date has not expired, prior to assigning a document to the container.
Storage Level <= Rated Level	If checked, the storage level must be less than or equal to the rated level indicated on the home page of the secured container record.
Verify No Active Documents Assigned Prior to Marking Container Inactive	When enabled, and a container is marked as inactive, if one or more documents are still assigned to the container the user will receive a validation error when saving the record. If the document is archived, destroyed, or externally transferred it will not trigger the validation. If a container is marked as inactive, with the exception of checking for valid active documents, all other container validations will be skipped (such as combination expiration). If a database audit is run from the Utilities module, all inactive containers that still have active documents will be included.

System Customization Output Lists

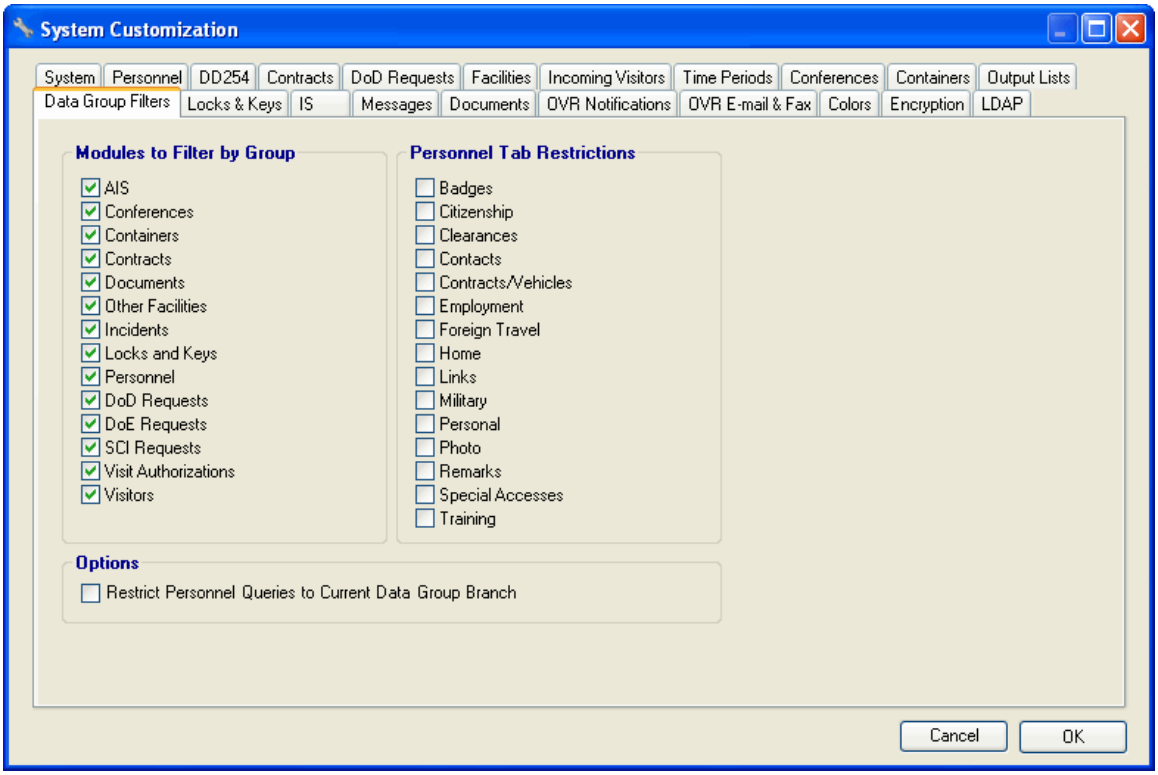


For more information about using this screen, see Input Screen.

System Customization, Output Lists Page Fields

Field Name	Description
Disable Record Paging	If checked, the selected module will display all the records from the database at once. Instead of using the default page up/down keys, a scroll bar will allow the user to stroll up/down through the all the records. This is similar to SIMS 6 behavior.
Disable selection check boxes	If checked, records will be highlighted upon selecting each record. Only rows on the current output list screen can be selected if the default record paging system is used. Leave the option unchecked to allow for check box selection in the output list screen. The check boxes allow the user to use the up/down paging system while allowing the user to select records that exist on different output list screens within the module.
Disable checked and highlighted warning dialog	When executing a transaction (i.e. copy), a warning dialog will appear with options to: check highlighted rows and add to existing, use only checked rows, clear all checked rows and check all highlighted rows. The default option on how to use the checked and highlighted rows in the output list screens can be set here instead of displaying a warning dialog every time this feature is used.

System Customization Data Group Filters

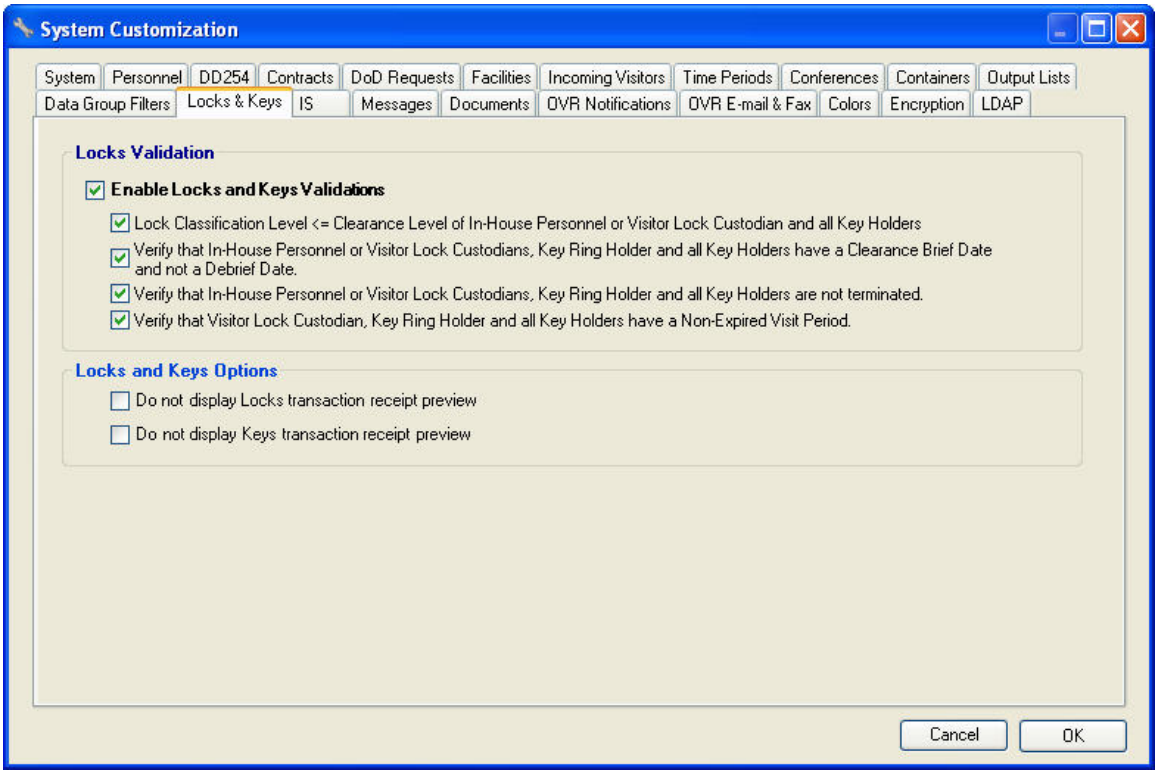


For more information about using this screen, see Input Screen.

System Customization, Data Group Filters Page Fields

Field Name	Description
Modules to Filter by Group	If checked, the module will be filtered by the user's data group defined in User Management.
Personnel Tab Restrictions	If checked, changes to the selected Personnel tab will not be allowed outside of the user's data group.
Options	If checked, the Query Editor will allow queries only within the user's current data group branch. The Enterprise Wide option in the Query Editor will be grayed out.

System Customization Locks


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OVR E-mail & Fax
Colors
Encryption
LDAP
Locks Validation
Enable Locks and Keys Validations
Lock Classification Level <= Clearance Level of In-House Personnel or Visitor Lock Custodian and all Key Holders
Verify that In-House Personnel or Visitor Lock Custodians, Key Ring Holder and all Key Holders have a Clearance Brief Date and not a Debrief Date.
Verify that In-House Personnel or Visitor Lock Custodians, Key Ring Holder and all Key Holders are not terminated.
Verify that Visitor Lock Custodian, Key Ring Holder and all Key Holders have a Non-Expired Visit Period.
Locks and Keys Options
Do not display Locks transaction receipt preview
Do not display Keys transaction receipt preview
Cancel
OK

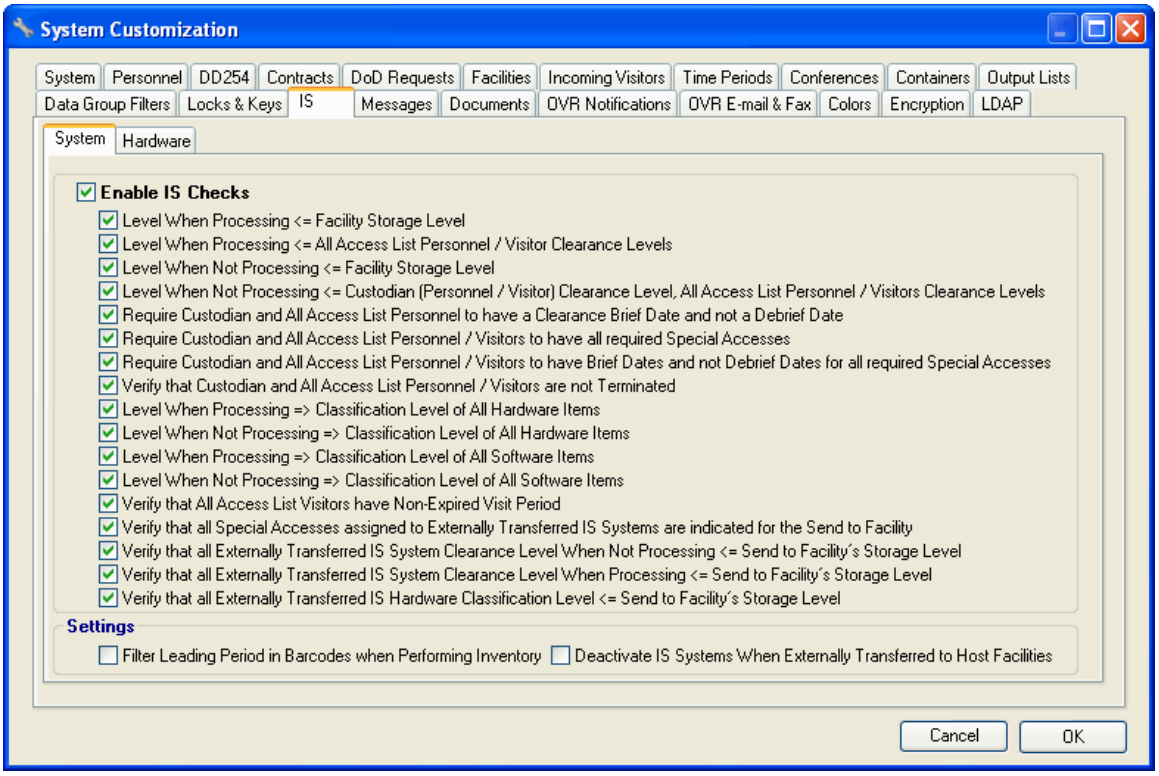
For more information about using this screen, see Input Screen.

System Customization, Locks and Keys Page Fields

Field Name	Description
Enable Locks Validations	If checked, enables lock validation checks that are enabled below.
Lock Classification <= Clearance Level of all Keyholders and Clearance Level of Lock Custodian	If checked, the clearance level of the lock must be less than or equal to the clearance level of all keyholders and the clearance level of the lock custodian.
Verify that Lock Custodian and all Keyholders have a Clearance Brief Date and not a Debrief Date	If checked, the lock custodian and all keyholders must have a clearance with a brief date, but not a debrief date.
Verify that Lock Custodian and all Keyholders are not terminated	If checked, the lock custodian and all keyholders cannot be terminated.
Verify that the Visitor Lock Custodian, Key Ring Holder and all Key Holders have a Non-Expired Visit Period	If checked, the lock custodian, Key Ring Holder and all Key Holders that are Visitor types must have a visit period that has not expired.
Do not display Locks transaction receipt preview	If checked, the Locks transaction receipt preview will not display. The audit trail entry will still be created.

Do not display Keys transaction receipt preview	If checked, the Keys transaction receipt preview will not display. The audit trail entry will still be created.

System Customization IS

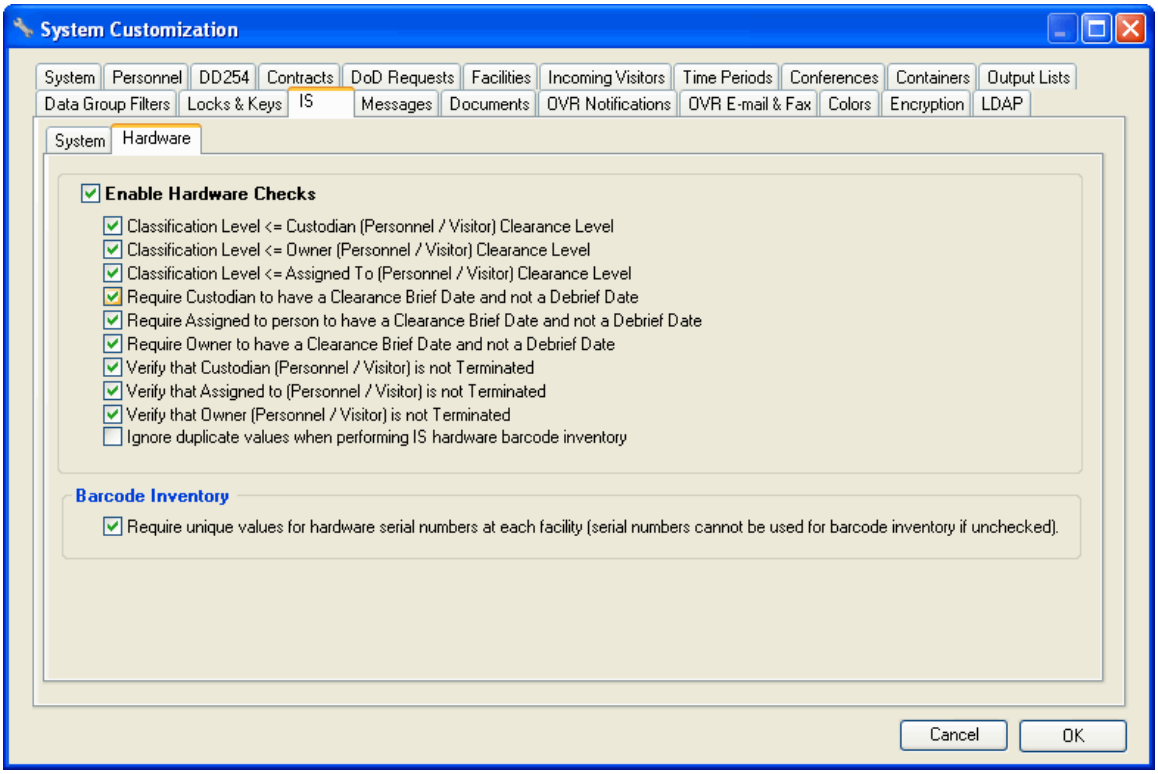

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Enable IS Checks
Level When Processing <= Facility Storage Level
Level When Processing <= All Access List Personnel / Visitor Clearance Levels
Level When Not Processing <= Facility Storage Level
Level When Not Processing <= Custodian (Personnel / Visitor) Clearance Level, All Access List Personnel / Visitors Clearance Levels
Require Custodian and All Access List Personnel to have a Clearance Brief Date and not a Debrief Date
Require Custodian and All Access List Personnel / Visitors to have all required Special Accesses
Require Custodian and All Access List Personnel / Visitors to have Brief Dates and not Debrief Dates for all required Special Accesses
Verify that Custodian and All Access List Personnel / Visitors are not Terminated
Level When Processing => Classification Level of All Hardware Items
Level When Not Processing => Classification Level of All Hardware Items
Level When Processing => Classification Level of All Software Items
Level When Not Processing => Classification Level of All Software Items
Verify that All Access List Visitors have Non-Expired Visit Period
Verify that all Special Accesses assigned to Externally Transferred IS Systems are indicated for the Send to Facility
Verify that all Externally Transferred IS System Clearance Level When Not Processing <= Send to Facility's Storage Level
Verify that all Externally Transferred IS System Clearance Level When Processing <= Send to Facility's Storage Level
Verify that all Externally Transferred IS Hardware Classification Level <= Send to Facility's Storage Level
Settings
Filter Leading Period in Barcodes when Performing Inventory
Deactivate IS Systems When Externally Transferred to Host Facilities
Cancel
OK

For more information about using this screen, see Input Screen.

System Customization, IS System Page Fields

Field Name	Description
Enable IS Checks	If checked, enables IS validation checks that are enabled below.
Level When Processing <= Facility Storage Level	If checked, the Level When Processing must be less than or equal to the IS facility storage level.
Level When Processing Level <= Custodian (Personnel / Visitor) Clearance Level, All Access List Personnel / Visitors Clearance Levels	If checked, the Level When Processing must be less than or equal to the clearance level of the personnel/visitor custodian, and the clearance level of all personnel/visitors listed in the IS Access List.
Level When Not Processing <= Facility Storage Level	If checked, the Level When Processing must be less than or equal to IS facility storage level.

Level When Not Processing <= Custodian (Personnel / Visitor) Clearance Level, All Access List Personnel / Visitors Clearance Levels	If checked, the Level When Processing must be less than or equal to the clearance level of the custodian (personnel/visitor) and the clearance level of all Access List personnel/visitors.
Require Custodian and All Access List Personnel to have a Clearance Brief Date and not a Debrief Date	If checked, the custodian and all Access list personnel must have a clearance brief date, and not a debrief date.
Require Custodian and All Access List Personnel / Visitors to have all required Special Accesses	If checked, all personnel/visitors in the Access List must have all special accesses relating to the IS record.
Require Custodian and All Access List Personnel / Visitors to have Brief Dates and not Debrief Dates for all required Special Accesses	If checked, the custodian and all Access List personnel/visitors must have all special accesses relating to the IS record. The special accesses must have a brief date and no debrief dates.
Verify that Custodian and All Access List Personnel are not Terminated	If checked, the custodian and Access List Personnel cannot be terminated.
Level When Processing => Classification Level of All Hardware Items	The Level When Processing must be equal to or greater than the classification level of all hardware items.
Level When Not Processing => Classification Level of All Hardware Items	The Level When Not Processing must be greater than or equal to the classification level of all hardware items.
Level When Processing => Classification Level of All Software Items	The Level When Processing must be equal to or greater than the classification level of all software items.
Level When Not Processing => Classification Level of All Software Items	The Level When Not Processing must be greater than or equal to the classification level of all software items.
Verify that All Access List Visitors have Non-Expired Visit Period	All Access List visitors must have non-expired visit authorizations.
Filter Leading Period in Barcodes when Performing Inventory	If checked, a leading period can appear in the Barcode Inventory file. During the IS Barcode Inventory transaction, the leading period will be filtered.
Deactivate IS Systems When Externally Transferring to Host Facilities	If checked, the IS system will be archived when executing a System External Transfer transaction.


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Enable Hardware Checks
Classification Level <= Custodian (Personnel / Visitor) Clearance Level
Classification Level <= Owner (Personnel / Visitor) Clearance Level
Classification Level <= Assigned To (Personnel / Visitor) Clearance Level
Require Custodian to have a Clearance Brief Date and not a Debrief Date
Require Assigned to person to have a Clearance Brief Date and not a Debrief Date
Require Owner to have a Clearance Brief Date and not a Debrief Date
Verify that Custodian (Personnel / Visitor) is not Terminated
Verify that Assigned to (Personnel / Visitor) is not Terminated
Verify that Owner (Personnel / Visitor) is not Terminated
Ignore duplicate values when performing IS hardware barcode inventory
Barcode Inventory
Require unique values for hardware serial numbers at each facility (serial numbers cannot be used for barcode inventory if unchecked).
Cancel
OK

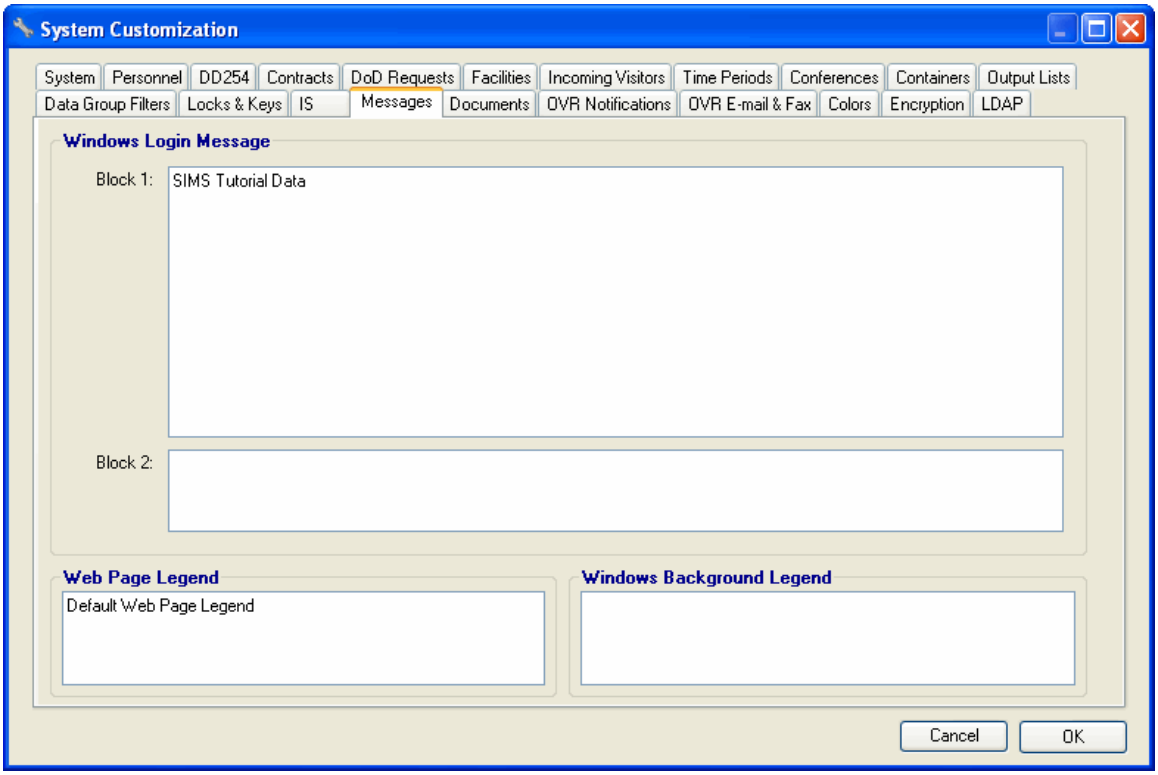
For more information about using this screen, see Input Screen.

System Customization, IS Hardware Page Fields

Field Name	Description
Enable Hardware Checks	If checked, enables IS hardware validation checks that are enabled below.
Classification Level <= Custodian (Personnel / Visitor) Clearance Level	If checked, the hardware Classification Level must be less than or equal to the clearance level of the Custodian personnel/visitor .
Classification Level <= Owner (Personnel / Visitor) Clearance Level	If checked, the hardware Classification Level must be less than or equal to the clearance level of the Owner personnel/visitor .
Classification Level <= Assigned To (Personnel / Visitor) Clearance Level	If checked, the hardware Classification Level must be less than or equal to the clearance level of the Assigned To personnel/visitor.
Require Custodian to have a Clearance Brief Date and not a Debrief Date	If checked, the Custodian must have a clearance brief date and not a debrief date.
Require Assigned to person to have a Clearance Brief Date and not a Debrief Date	If checked, the Assigned to person must have a clearance brief date and not a debrief date.

Require Owner to have a Clearance Brief Date and not a Debrief Date	If checked, the Owner must have a clearance brief date and not a debrief date.
Verify that Custodian (Personnel / Visitor) is not Terminated	If checked, the Custodian cannot be terminated.
Verify that Assigned to (Personnel / Visitor) is not Terminated	If checked, the Assigned to person cannot be terminated.
Verify that Owner (Personnel / Visitor) is not Terminated	If checked, the Owner cannot be terminated.
Ignore duplicate values when performing IS hardware barcode inventory	If checked, duplicate values will be ignored when performing the IS hardware barcode inventory.
Require unique values for hardware serial numbers at each facility (serial numbers cannot be used for barcode inventory if unchecked).	If checked, hardware serial numbers at each IS ID/facility record must be unique. The serial numbers can be used for the barcode inventory report. If this option is unchecked, the serial number will not be enforced as unique and will not be used during barcode inventory.

System Customization Message Customization

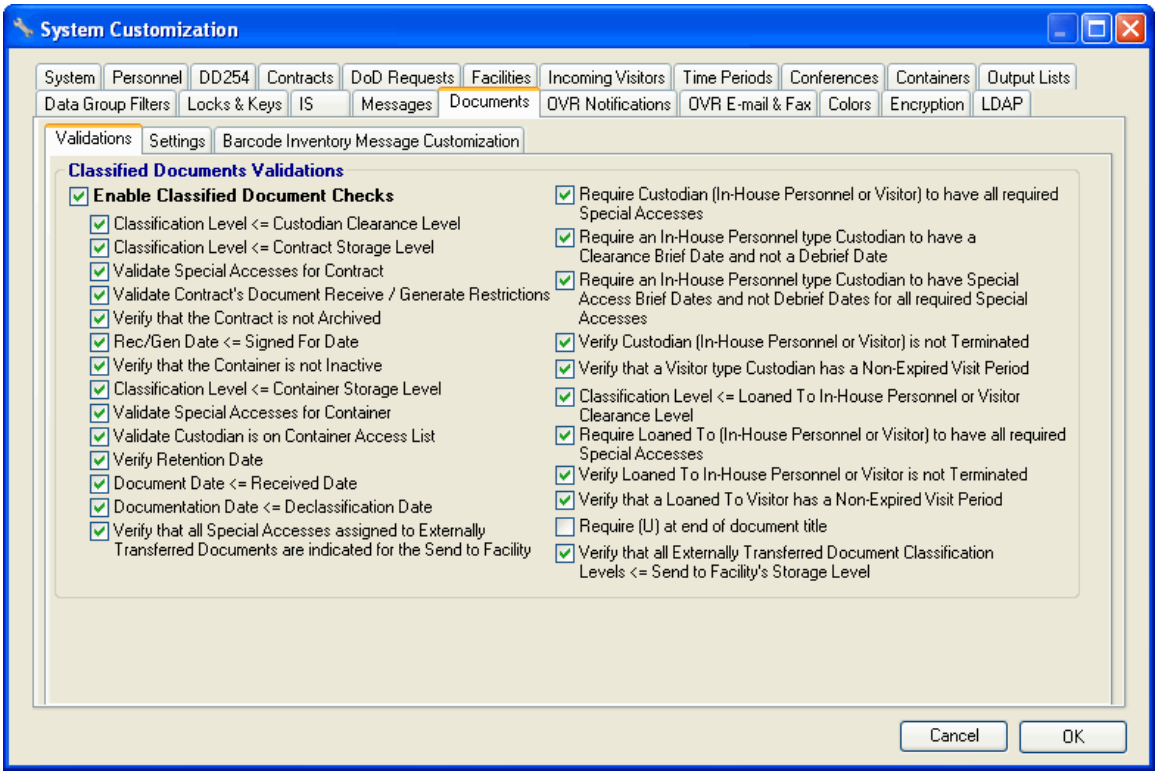


For more information about using this screen, see Input Screen.

System Customization, Message Customization Page Fields

Field Name	Description
Block 1	The message displayed in the first block of the SIMS login screen.
Block 2	The message displayed in the second block of the SIMS login screen.
Block 3	The message displayed in the third block of the SIMS login screen.
Block 4	The message displayed in the fourth block of the SIMS login screen.
Web Page Legend	Indicates the default web page legend in the SIMS login screen.
Windows Background Legend	Indicates the background legend in the SIMS login screen.

System Customization Documents

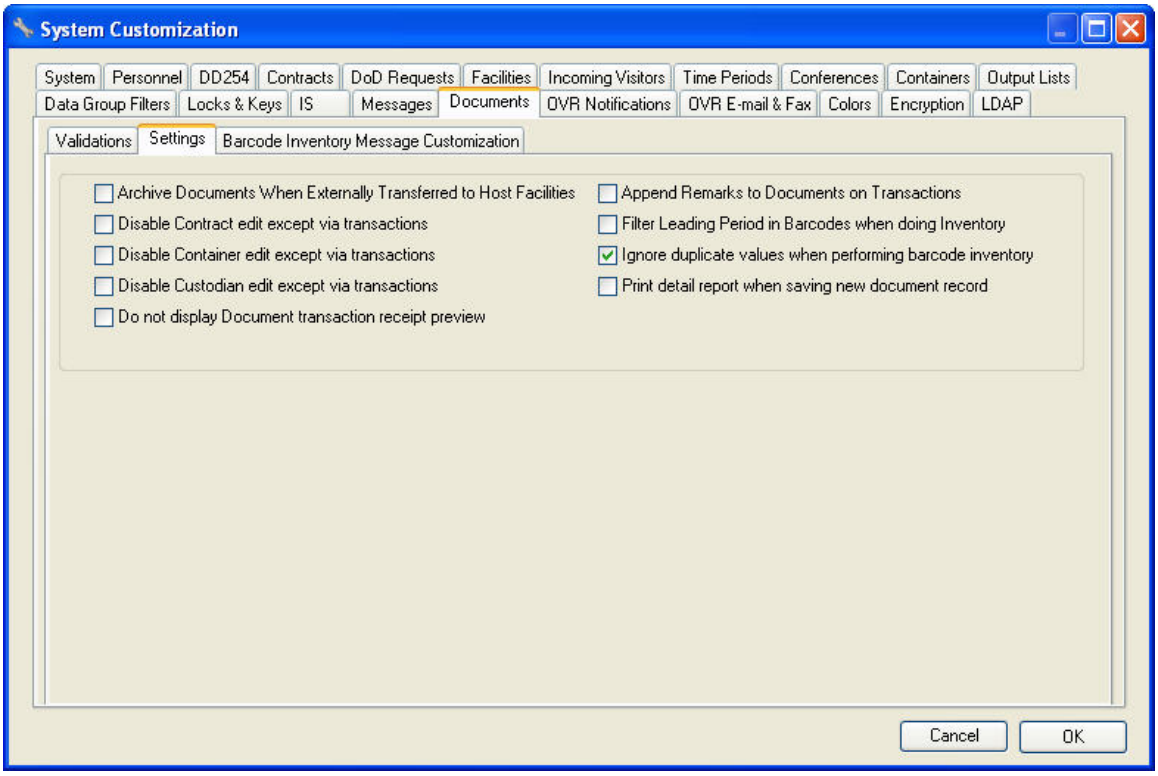

System Customization
System
Personnel
DD254
Contracts
DoD Requests
Facilities
Incoming Visitors
Time Periods
Conferences
Containers
Output Lists
Data Group Filters
Locks & Keys
IS
Messages
Documents
OVR Notifications
OVR E-mail & Fax
Colors
Encryption
LDAP
Validations
Settings
Barcode Inventory Message Customization
Classified Documents Validations
Enable Classified Document Checks
Classification Level <= Custodian Clearance Level
Classification Level <= Contract Storage Level
Validate Special Accesses for Contract
Validate Contract's Document Receive / Generate Restrictions
Verify that the Contract is not Archived
Rec/Gen Date <= Signed For Date
Verify that the Container is not Inactive
Classification Level <= Container Storage Level
Validate Special Accesses for Container
Validate Custodian is on Container Access List
Verify Retention Date
Document Date <= Received Date
Documentation Date <= Declassification Date
Verify that all Special Accesses assigned to Externally Transferred Documents are indicated for the Send to Facility
Require Custodian (In-House Personnel or Visitor) to have all required Special Accesses
Require an In-House Personnel type Custodian to have a Clearance Brief Date and not a Debrief Date
Require an In-House Personnel type Custodian to have Special Access Brief Dates and not Debrief Dates for all required Special Accesses
Verify Custodian (In-House Personnel or Visitor) is not Terminated
Verify that a Visitor type Custodian has a Non-Expired Visit Period
Classification Level <= Loaned To In-House Personnel or Visitor Clearance Level
Require Loaned To (In-House Personnel or Visitor) to have all required Special Accesses
Verify Loaned To In-House Personnel or Visitor is not Terminated
Verify that a Loaned To Visitor has a Non-Expired Visit Period
Require (U) at end of document title
Verify that all Externally Transferred Document Classification Levels <= Send to Facility's Storage Level
Cancel
OK

For more information about using this screen, see Input Screen.

System Customization, Document Validations Page Fields

Field Name	Description
Enable Classified Document Checks	If checked, enables document validations that are enabled below.
Classification Level <= Custodian Clearance Level	If checked, the document's classification level must be less than or equal to the custodian Clearance Level.
Classification Level <= Contract Storage Level	If checked, the document's classification level must be less than or equal to the contract's storage level.
Validate Special Accesses for Contract	If checked, the special accesses for the contract must be listed as one of the special accesses for the document.
Validate Contract's Document Receive / Generate Restrictions	If checked, the contract receive/generate restrictions will be applied.
Verify that the Contract is not Archived	If checked, the contract is not archived. A contract is archived if the contract's End Date is equal to or less than the current date OR if Closed Out is true.
Rec/Gen Date <= Signed for Date	The rec/gen date must be less than or equal to the signed for date.
Verify that the Container is not Inactive	If checked, the container cannot be archived.
Classification Level <= Container Storage Level	If checked, the document's classification level must be less than or equal to the containers' storage level.
Validate Special Accesses for Container	If checked, the special accesses for the container must be listed as one of the special accesses for the document.
Validate Custodian is on Container Access List	If checked, the custodian must be on the document container Access List.
Verify retention Date	If checked, the contract's retention date will be verified.
Document Date <= Received Date	If checked, the document date must be less than or equal to the received date.
Documentation Date <= Declassification Date	If checked, the document date must be less than or equal to the declassification date.

Verify that all Special Accesses assigned to Externally Transferred Documents are indicated for the Send to Facility	If checked, the send to facility must have all special accesses that belong to the externally transferred document.
Verify that all Externally Transferred Document Classification Levels<= Send to Facility's Storage Level	If checked, all externally transferred documents must have a classification level equal to or less than the send to facility's storage level.
Require Custodian (In-House Personnel or Visitor) to have all required Special Accesses	If checked, the special accesses for the in-house personnel type custodian must be listed as one of the special accesses for the document.
Require an In-House Personnel type Custodian to have a Clearance Brief Date and not a Debrief Date	If checked, the clearances for the custodian must have a brief date and not a debrief date.
Require an In-House Personnel type Custodian to have Special Access Brief Dates and not Debrief Dates for all required Special Accesses	If checked, the in-house personnel type custodian must have all special accesses that belong to the document. In addition, the special accesses of the custodian must have brief dates and cannot have debrief dates.
Verify Custodian (In-House Personnel or Visitor) is not Terminated	If checked, an in-house personnel type custodian or visitor is not terminated.
Verify that a Visitor type Custodian has a Non-Expired Visit Period	If checked, a visitor type custodian cannot have an expired visit period.
Classification Level <= Loaned To In-House Personnel or Visitor Clearance Level	If checked, the document's classification level must be less than or equal to the In-House Personnel or Visitor clearance level
Verify Loaned To In-House Personnel or Visitor is not Terminated	If checked, the loaned to in-house personnel or visitor cannot be terminated.
Verify that a Loaned to Visitor has a Non-Expired Visit Period	If checked, a loaned to visitor type cannot have an expired visit period.
Archive Documents When Externally Transferred to Host Facilities	If checked, the document will be archived after an external transfer to a host facility occurs.
Append Remarks to Documents on Transactions	If checked, transaction remarks will appear in the transaction report. This settings are modifiable in the document transaction dialog.
Require (U) at end of document title	If checked, a (U) will need to appear at the end of the document title.
Verify that all Externally Transferred Document Classification Levels <= Send to Facility's Storage Level	If checked, the externally transferred document's classification level must be less than or equal to the Send to Facility's storage level.

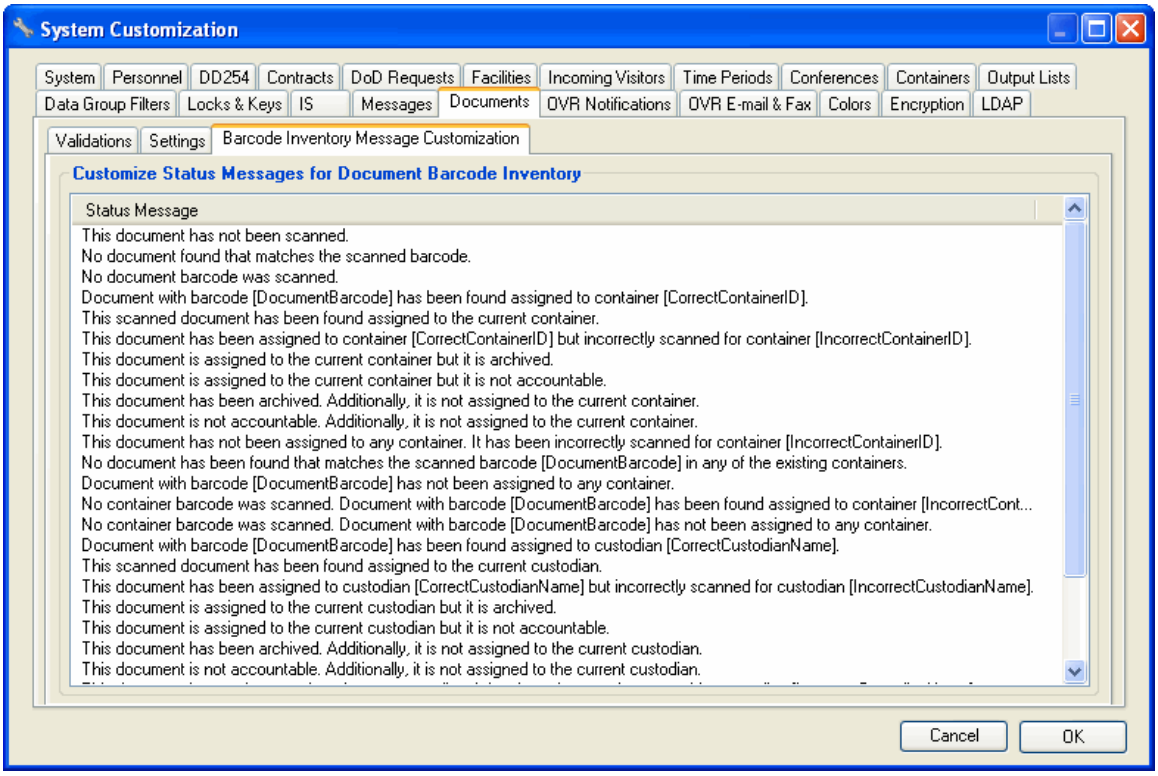


For more information about using this screen, see Input Screen.

System Customization, Document Settings Page Fields

Field Name	Description
Archive Documents When Externally Transferred to Host Facilities	If checked, the document record will be archived when performing an external transfer to a host facility.
Disable Contract edit except via transactions	If checked, the contract field can only be changed when adding a new record. A later change to the contract field must be performed by a transaction.
Disable Container edit except via transactions	If checked, the container field can only be changed when adding a new record. A later change to the container field must be performed by a transaction.
Disable Custodian edit except via transactions	If checked, the custodian field can only be changed when adding a new record. A later change to the custodian field must be performed by a transaction.
Append Remarks to Documents on Transactions	If checked, remarks will be appended on document transaction reports.

Filter Leading Period in Barcodes when doing Inventory	If checked, a leading period can appear in the Barcode Inventory file. During the Document Barcode Inventory transaction, the leading period will be filtered.
Ignore duplicate values when performing barcorde inventory	If checked, duplicate values will be ignored when performing a barcode inventory.
Print detail report when saving new document record	If checked, a detail report will display when saving a new document record.
Do not display Document transaction receipt preview	If checked, the Documents transaction receipt preview will not display. The audit trail entry will still be created.


System Customization
System
Personnel
DD254
Contracts
DoD Requests
Facilities
Incoming Visitors
Time Periods
Conferences
Containers
Output Lists
Data Group Filters
Locks & Keys
IS
Messages
Documents
OVR Notifications
OVR E-mail & Fax
Colors
Encryption
LDAP
Validations
Settings
Barcode Inventory Message Customization
Customize Status Messages for Document Barcode Inventory
Status Message
This document has not been scanned.
No document found that matches the scanned barcode.
No document barcode was scanned.
Document with barcode [DocumentBarcode] has been found assigned to container [CorrectContainerID].
This scanned document has been found assigned to the current container.
This document has been assigned to container [CorrectContainerID] but incorrectly scanned for container [IncorrectContainerID].
This document is assigned to the current container but it is archived.
This document is assigned to the current container but it is not accountable.
This document has been archived. Additionally, it is not assigned to the current container.
This document is not accountable. Additionally, it is not assigned to the current container.
This document has not been assigned to any container. It has been incorrectly scanned for container [IncorrectContainerID].
No document has been found that matches the scanned barcode [DocumentBarcode] in any of the existing containers.
Document with barcode [DocumentBarcode] has not been assigned to any container.
No container barcode was scanned. Document with barcode [DocumentBarcode] has been found assigned to container [IncorrectCont...
No container barcode was scanned. Document with barcode [DocumentBarcode] has not been assigned to any container.
Document with barcode [DocumentBarcode] has been found assigned to custodian [CorrectCustodianName].
This scanned document has been found assigned to the current custodian.
This document has been assigned to custodian [CorrectCustodianName] but incorrectly scanned for custodian [IncorrectCustodianName].
This document is assigned to the current custodian but it is archived.
This document is assigned to the current custodian but it is not accountable.
This document has been archived. Additionally, it is not assigned to the current custodian.
This document is not accountable. Additionally, it is not assigned to the current custodian.
Cancel
OK

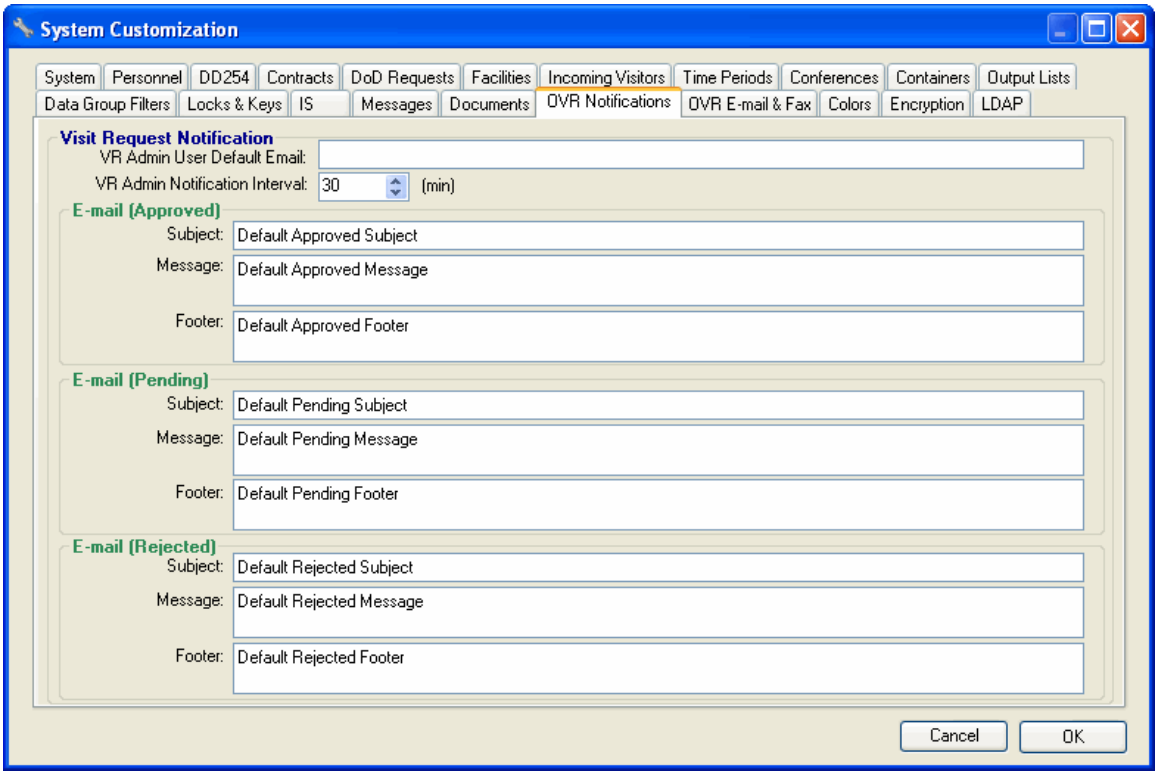
For more information about using this screen, see Input Screen.

System Customization, Document Barcode Message Customization Page Fields

Field Name	Description

Status Message	A list of messages that appear in the barcode inventory report are listed in this screen. To edit one of the built-in barcode messages, double click on the message. In the dialog that appears, edit the new message that will display on the barcode inventory report. The next time the document barcode inventory report is executed, the new message will display.

System Customization OVR Notifications



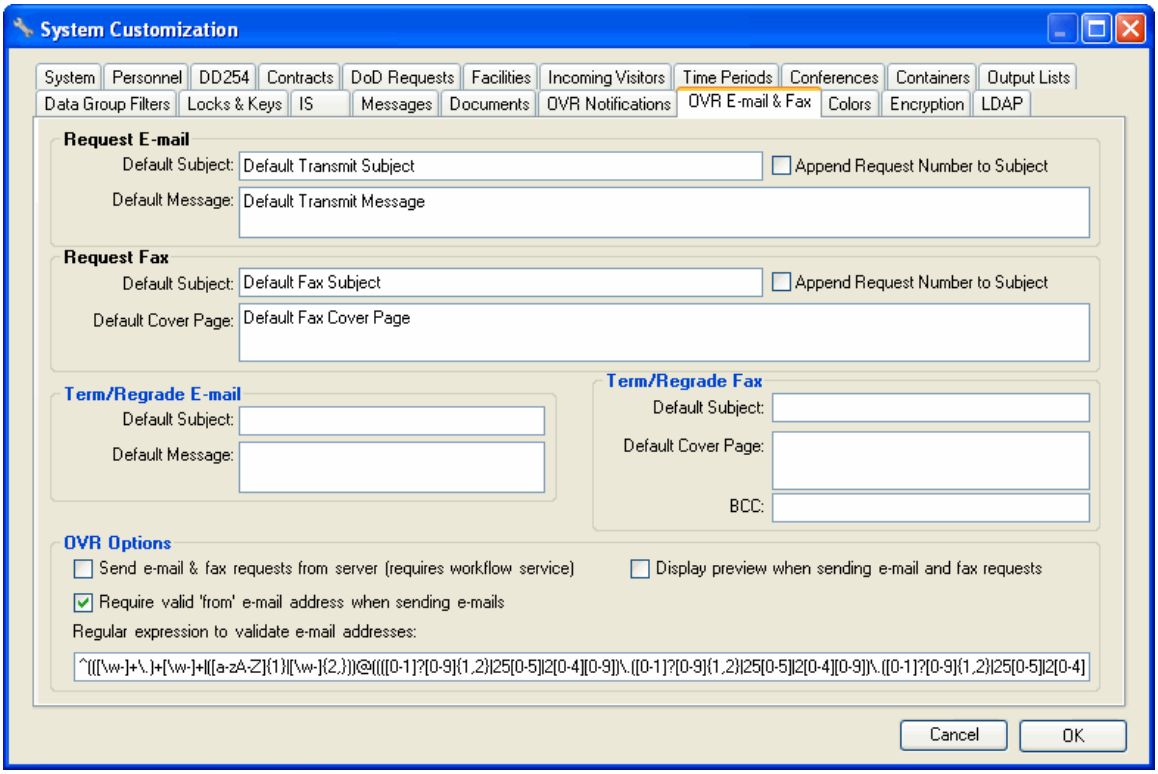
For more information about using this screen, see Input Screen.

System Customization, OVR Notifications Page Fields

Field Name	Description
VR Admin User Default Email	When a VR Admin User uses the Accept or Reject buttons in a Pending Visit Request record an email is sent to the Requester. This email address entered here is used as the Return or Reply to address.
VR Admin Notification Interval	This sets the time interval for VR Admin notification of pending records. The default is 30 minutes. The interval range can be set from 1 minute to 10080 minutes (1 week).

(Approved) Default Subject	Enter a email subject for an approved outgoing visit request. This subject would be the default, but can be changed at the time the request is sent.
(Approved) Default Message	Enter a email message (body) for an approved outgoing visit request. This message would be the default, but can be changed at the time the request is sent.
(Approved) Footer	Enter a footer for the for an approved outgoing visit request email.
(Pending) Default Subject	Enter a email subject for a pending outgoing visit request. This subject would be the default, but can be changed at the time the request is sent.
(Pending)Default Message	Enter a email message (body) for a pending outgoing visit request. This message would be the default, but can be changed at the time the request is sent.
(Pending)Footer	Enter a footer for the for an pending outgoing visit request email.
(Rejected) Default Subject	Enter a email subject for a rejected outgoing visit request. This subject would be the default, but can be changed at the time the request is sent.
(Rejected) Default Message	Enter a email message (body) for a rejected outgoing visit request. This message would be the default, but can be changed at the time the request is sent.
(Rejected) Footer	Enter a footer for the for a rejected outgoing visit request email.

System Customization OVR Email & Fax

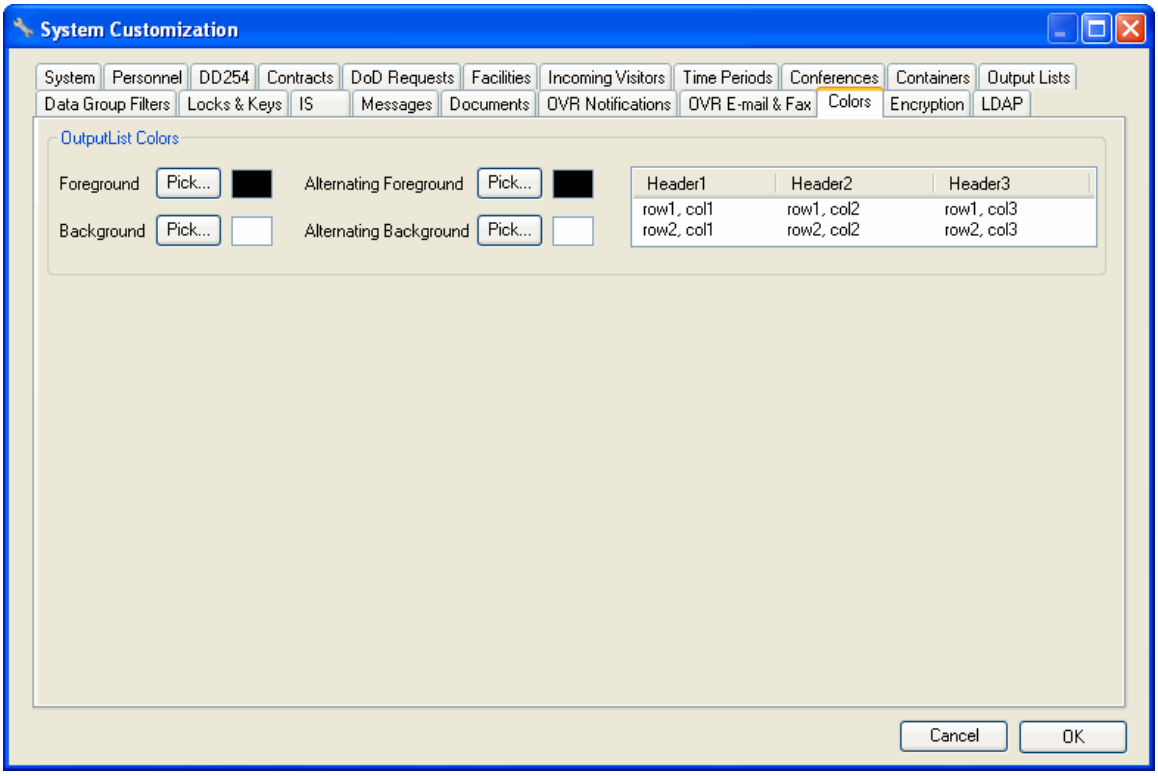


For more information about using this screen, see Input Screen.

System Customization, OVR Email & Fax Page Fields

Field Name	Description
(Transmit) Default Subject	Enter a subject for an outgoing visit request email. This subject would be the default, but can be changed at the time the request is sent.
(Transmit) Default Message	Enter a message (body) for an outgoing visit request email. This message would be the default, but can be changed at the time the request is sent.
(Fax) Default Subject	Enter a subject for an outgoing visit request fax. This subject would be the default, but can be changed at the time the request is sent.
Append Request Number to Subject	Check this option if you wish to include the outgoing visit request number in the fax's subject.
(Fax) Default Cover Page	Enter the default text for the fax's cover page.
Term/Regrade Fax BCC	Anytime a Term/Regrade is faxed, a copy will go to the email specified as a "BCC".
OVR Options	If checked, the OVR e-mail option will be applied.

System Customization Colors

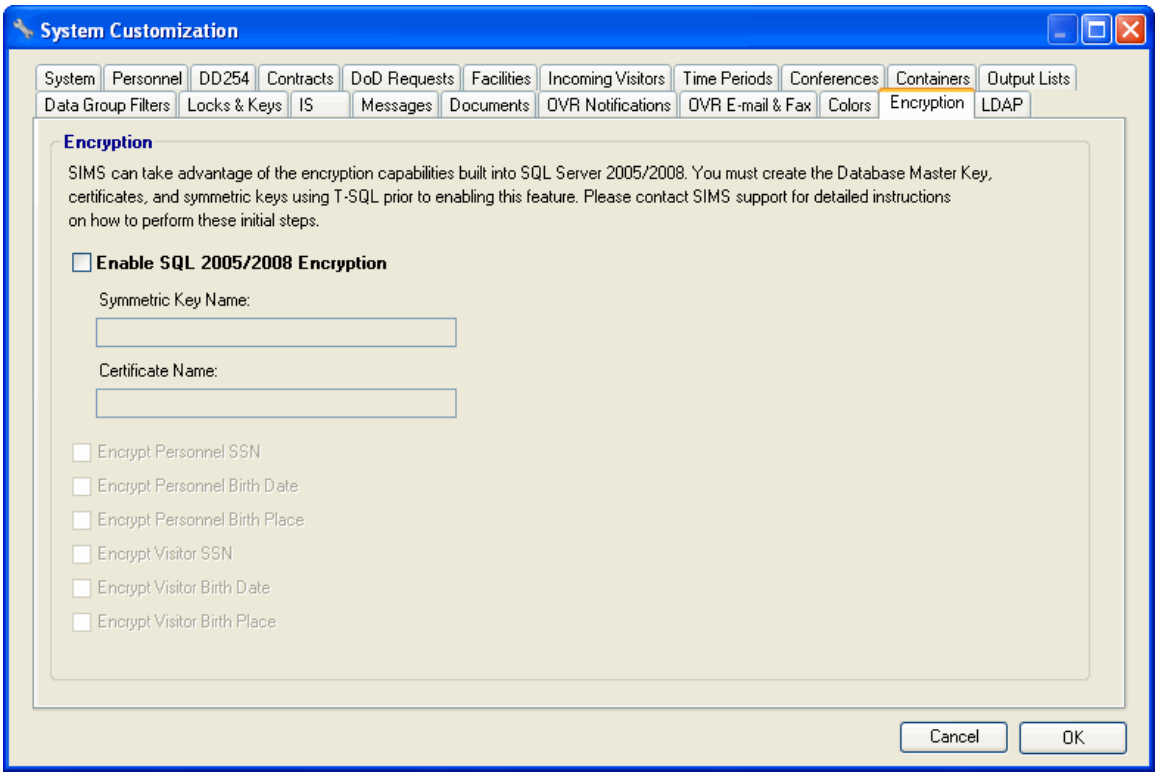


For more information about using this screen, see Input Screen.

System Customization, Color Page Fields

Field Name	Description
Foreground	Pick the foreground color. This will affect the color of the text for the first row and every other row that appears in the output list of each module.
Background	Pick the background color. This will affect the color of the background for the first row and every other row that appears in the output list of each module.
Alternating Foreground	Pick the alternating foreground color. This will affect the color of the text for the alternating rows that appear in the output list of each module.
Alternating Background	Pick the alternating background color. This will affect the color of the background for the alternating rows that appear in the output list of each module.

System Customization Encryption



For more information about using this screen, see Input Screen.

System Customization, Encryption Page Fields

Field Name	Description
Enable SQL 2005/2008 Encryption	Check this box to enable encryption. Choose to enable Personnel and Visitor SSN, Birth Date, and Birth Place fields in SQL Server 2005 and 2008. A T-SQL script must be executed prior to enabling this feature when using SQL Server 2005. See the script below under the section, *Enabling database encryption for new SIMS users*.
Symmetric Key Name	Specify the Symmetric Key Name.
Certificate Name	Specify the Certificate Name.
Encrypt Personnel SSN	If checked, Personnel SSNs will be encrypted.
Encrypt Personnel Birth Date	If checked, Personnel Birth Dates will be encrypted.
Encrypt Personnel Birth Place	If checked, Personnel Birth Places will be encrypted.
Encrypt Visitor Birth SSN	If checked, Visitor SSNs will be encrypted.

Encrypt Visitor Birth Date	If checked, Visitor Birth Dates will be encrypted.
Encrypt Visitor Birth Place	If checked, Visitor Birth Places will be encrypted.

SIMS Database Encryption Instructions

Enabling database encryption for new SIMS users:

1. Request the encryption script from SIMS technical support or copy it it below.
2. Select **Start / Programs / Microsoft SQL Server / SQL Server Management Studio**.
3. Select **File / Open / File** and browse to the SIMS encryption script.
4. Review the notes in the encryption script and make the appropriate changes to password, certificate name, and key name.
5. Select **Query / Execute** or **F5** to execute the script.
6. Verify the script completed without any errors.
7. Login to the SIMS application.
8. Go to **Utilities \ System Customization \ Encryption Tab**.
9. Check the box next to the fields to be encrypted.
10. Enter your *Symmetric Key Name* and *Certificate Name* and select OK to save changes.

```
------------------------------------------------------------
-- 09/21/08: Initial version (CC)
------------------------------------------------------------
-- The following example script is used to configure
-- SIMS support for SQL Server 2005 native encryption.
-- The values 'SimsEncryptionCertificate' and
-- 'SimsSymmetricEncryption' can be changed by the end user.
-- These values will be entered into SIMS via
-- Utilities / System Customization / Encryption.
------------------------------------------------------------
-- User is strongly encourage to change all default
-- passwords in this script.
------------------------------------------------------------

-- Select SIMS database
USE SimsXml

-- Create Database Master Key
CREATE MASTER KEY ENCRYPTION BY PASSWORD = 'DefaultPassword'

-- Create initial certificate
CREATE CERTIFICATE SimsEncryptionCertificate WITH SUBJECT = 'SIMS'

------------------------------------------------------------
-- Create symmetric key used for data encryption/decryption.
-- Available algorithms are DES, TRIPLE_DES, RC2, RC4, RC4_128,
-- DESX, AES_128, AES_192 and AES_256.
-- AES_128, AES_192, and AES_256 are not supported on XP or 2000.
------------------------------------------------------------
CREATE SYMMETRIC KEY SimsSymmetricEncryption
WITH ALGORITHM = TRIPLE_DES
ENCRYPTION BY CERTIFICATE SimsEncryptionCertificate

------------------------------------------------------------
-- !!! IMPORTANT !!!
------------------------------------------------------------
-- Backup master encryption keys.
-- DO NOT SAVE BACKUP TO SAME DRIVE AS SQL DATABASE!
------------------------------------------------------------
BACKUP MASTER KEY
TO FILE = 'C:\MasterKeyBackup'
ENCRYPTION BY PASSWORD = 'astrongpassword'

-- The name of the certificate is specified in the
-- previous CREATE CERTIFICATE statement.
BACKUP CERTIFICATE SimsEncryptionCertificate
TO FILE = 'C:\SimsEncryptionCertBackup'
------------------------------------------------------------
```

Additional instructions for existing SIMS database users:

11. After completing the steps in the previous section, you must move the existing data from the SSN, Birth Date, and Birth Place fields into the corresponding encrypted fields.
12. Request the update encrypted fields script from SIMS technical support or copy it below.
13. Select **Start / Programs / Microsoft SQL Server / SQL Server Management Studio**.
14. Select **File / Open / File** and browse to the SIMS update script.
15. Select **Query / Execute** or **F5** to execute the script.
16. Verify the script completed without any errors.

```
-- Author:       AB

-- Create date:  07/08/2011

-- Description:   This script will update Personnel Encrypted fields.

------------------------------------------------------------------------
--

-- Version History

------------------------------------------------------------------------
--

-- 07/08/2011 - AB - Initial version Update_SIMS_Encrypted_Fields_v1.0.sql
.

------------------------------------------------------------------------
--

-- Prerequisites

------------------------------------------------------------------------
--

-- You should always perform a database BACKUP before proceeding!

------------------------------------------------------------------------
--

-- Instructions

------------------------------------------------------------------------
--

-- Step 1: Open Microsoft SQL Server Management Studio.

-- Step 2: Open Update_SIMS_Encrypted_Fields_v1.0.sql attached to email.

-- Step 3: Execute script by pressing F5 or Query/Execute.
```

```
-------------------------------------------------------------------------
--

USE SimsXml

GO

-- Declare Variables.

DECLARE @RowID int

DECLARE @EncryptionEnabled int

DECLARE @Personnel_EncryptSSN int

DECLARE @Personnel_EncryptBirthPlace int

DECLARE @Personnel_EncryptBirthDate int

DECLARE @SymmetricKeyName varchar(100)

DECLARE @SimsCertificateName varchar(100)

DECLARE @Personnel_SSN varchar(100)

DECLARE @Personnel_BirthPlace varchar(100)

DECLARE @Personnel_BirthDate datetime

DECLARE @Personnel_TempSSN varchar(100)

DECLARE @Personnel_TempBirthPlace varchar(100)

DECLARE @Personnel_TempBirthDate datetime

DECLARE @Personnel_TempEncryptedSSN varbinary(8000)

DECLARE @Personnel_TempEncryptedBirthPlace varbinary(8000)

DECLARE @Personnel_TempEncryptedBirthDate varbinary(8000)

DECLARE @Visitor_EncryptSSN int

DECLARE @Visitor_EncryptBirthPlace int

DECLARE @Visitor_EncryptBirthDate int

DECLARE @Visitor_SSN varchar(100)

DECLARE @Visitor_BirthPlace varchar(100)

DECLARE @Visitor_BirthDate datetime
```

```
DECLARE @Visitor_TempSSN varchar(100)

DECLARE @Visitor_TempBirthPlace varchar(100)

DECLARE @Visitor_TempBirthDate datetime

DECLARE @Visitor_TempEncryptedSSN varbinary(8000)

DECLARE @Visitor_TempEncryptedBirthPlace varbinary(8000)

DECLARE @Visitor_TempEncryptedBirthDate varbinary(8000)

-- Select variables.

SELECT  @EncryptionEnabled = [Value]

FROM    SimsConfiguration

WHERE   [Key] = 'EnableEncryption'

SELECT  @Personnel_EncryptSSN = [Value]

FROM    SimsConfiguration

WHERE   [Key] = 'EnablePersonnelSSNEncryption'

SELECT  @Personnel_EncryptBirthPlace = [Value]

FROM    SimsConfiguration

WHERE   [Key] = 'EnablePersonnelBirthPlaceEncryption'

SELECT  @Personnel_EncryptBirthDate = [Value]

FROM    SimsConfiguration

WHERE   [Key] = 'EnablePersonnelBirthDateEncryption'

SELECT  @Visitor_EncryptSSN = [Value]

FROM    SimsConfiguration

WHERE   [Key] = 'EnableVisitorSSNEncryption'

SELECT  @Visitor_EncryptBirthPlace = [Value]

FROM    SimsConfiguration

WHERE   [Key] = 'EnableVisitorBirthPlaceEncryption'

SELECT  @Visitor_EncryptBirthDate = [Value]

FROM    SimsConfiguration
```

```
WHERE   [Key] = 'EnableVisitorBirthDateEncryption'

SELECT  @SymmetricKeyName = [Value]

FROM    SimsConfiguration

WHERE   [Key] = 'SymmetricEncryptionKeyName'

SELECT  @SimsCertificateName = [Value]

FROM    SimsConfiguration

WHERE   [Key] = 'SimsEncryptionCertificate'

-- Select initial Personnel row for processing.

SELECT  @RowID = MIN(ID)

FROM    Personnel

WHILE @RowID IS NOT NULL

      BEGIN

-- Clear variables.

            SET @Personnel_SSN = NULL

            SET @Personnel_BirthDate = NULL

            SET @Personnel_BirthPlace = NULL

-- Select variables.

            SELECT  @Personnel_SSN = SSN,

                    @Personnel_BirthDate = BirthDate,

                    @Personnel_BirthPlace = BirthPlace

            FROM    Personnel

            WHERE   Personnel.ID = @RowID

-- If encryption is enabled.

            IF @EncryptionEnabled = 1

               BEGIN

                     EXEC ( 'OPEN SYMMETRIC KEY '@SymmetricKeyName'
DECRYPTION BY CERTIFICATE '+@SimsCertificateName )
```

```
                    SET @Personnel_TempEncryptedSSN =
EncryptByKey(Key_GUID(@SymmetricKeyName) , @Personnel_SSN)

                    SET @Personnel_TempEncryptedBirthDate =
EncryptByKey(Key_GUID(@SymmetricKeyName) , CAST(@Personnel_BirthDate AS
varchar(50)))

                    SET @Personnel_TempEncryptedBirthPlace =
EncryptByKey(Key_GUID(@SymmetricKeyName) , @Personnel_BirthPlace)

-- Update Personnel EncryptedBirthDate field.

                    IF @Personnel_EncryptBirthDate = 1

                       BEGIN

                             UPDATE  Personnel

                             SET     EncryptedBirthDate =
@Personnel_TempEncryptedBirthDate,

                                     BirthDate = NULL

                             FROM    Personnel

                             WHERE   Personnel.ID = @RowID

                       END

-- Update Personnel EncryptedBirthPlace field.

                    IF @Personnel_EncryptBirthPlace = 1

                       BEGIN

                             UPDATE  Personnel

                             SET     EncryptedBirthPlace =
@Personnel_TempEncryptedBirthPlace,

                                     BirthPlace = NULL

                             FROM    Personnel

                             WHERE   Personnel.ID = @RowID

                       END

-- Update Personnel EncryptedSSN field.

                    IF @Personnel_EncryptSSN = 1
```

```
                        BEGIN
                              UPDATE  Personnel
                              SET     EncryptedSSN =
@Personnel_TempEncryptedSSN,
                                      SSN = NULL
                              FROM    Personnel
                              WHERE   Personnel.ID = @RowID
                        END
               END
            ELSE
               BEGIN
                     SET @Personnel_TempSSN = @Personnel_SSN
                     SET @Personnel_TempBirthDate = @Personnel_BirthDate
                     SET @Personnel_TempBirthPlace = @Personnel_BirthPlace
               END
-- Select next Personnel row for processing.
            SELECT  @RowID = MIN(ID)
            FROM    Personnel
            WHERE   Personnel.ID > @RowID
      END
-- Select initial Visitor row for processing.
SELECT  @RowID = MIN(ID)
FROM    Visitors
WHILE @RowID IS NOT NULL
      BEGIN
-- Clear variables.
            SET @Visitor_SSN = NULL
```

```
            SET @Visitor_BirthDate = NULL

            SET @Visitor_BirthPlace = NULL

-- Select variables.

            SELECT  @Visitor_SSN = SSN,

                    @Visitor_BirthDate = BirthDate,

                    @Visitor_BirthPlace = BirthPlace

            FROM    Visitors

            WHERE   Visitors.ID = @RowID

-- If encryption is enabled.

            IF @EncryptionEnabled = 1

               BEGIN

                     EXEC ( 'OPEN SYMMETRIC KEY '@SymmetricKeyName'
DECRYPTION BY CERTIFICATE '+@SimsCertificateName )

                     SET @Visitor_TempEncryptedSSN =
EncryptByKey(Key_GUID(@SymmetricKeyName) , @Visitor_SSN)

                     SET @Visitor_TempEncryptedBirthDate =
EncryptByKey(Key_GUID(@SymmetricKeyName) , CAST(@Visitor_BirthDate AS
varchar(50)))

                     SET @Visitor_TempEncryptedBirthPlace =
EncryptByKey(Key_GUID(@SymmetricKeyName) , @Visitor_BirthPlace)

-- Update Visitors EncryptedBirthDate field.

                     IF @Visitor_EncryptBirthDate = 1

                        BEGIN

                              UPDATE  Visitors

                              SET     EncryptedBirthDate =
@Visitor_TempEncryptedBirthDate,

                                      BirthDate = NULL

                              FROM    Visitors

                              WHERE   Visitors.ID = @RowID

                        END
```

```
-- Update Visitors EncryptedBirthPlace field.
                     IF @Visitor_EncryptBirthPlace = 1
                        BEGIN
                              UPDATE  Visitors
                              SET     EncryptedBirthPlace =
@Visitor_TempEncryptedBirthPlace,
                                      BirthPlace = NULL
                              FROM    Visitors
                              WHERE   Visitors.ID = @RowID
                        END
-- Update Visitors EncryptedSSN field.
                     IF @Visitor_EncryptSSN = 1
                        BEGIN
                              UPDATE  Visitors
                              SET     EncryptedSSN =
@Visitor_TempEncryptedSSN,
                                      SSN = NULL
                              FROM    Visitors
                              WHERE   Visitors.ID = @RowID
                        END
                END
             ELSE
                BEGIN
                      SET @Visitor_TempSSN = @Visitor_SSN
                      SET @Visitor_TempBirthDate = @Visitor_BirthDate
                      SET @Visitor_TempBirthPlace = @Visitor_BirthPlace
                END
```

```
-- Select next Visitor row for processing.

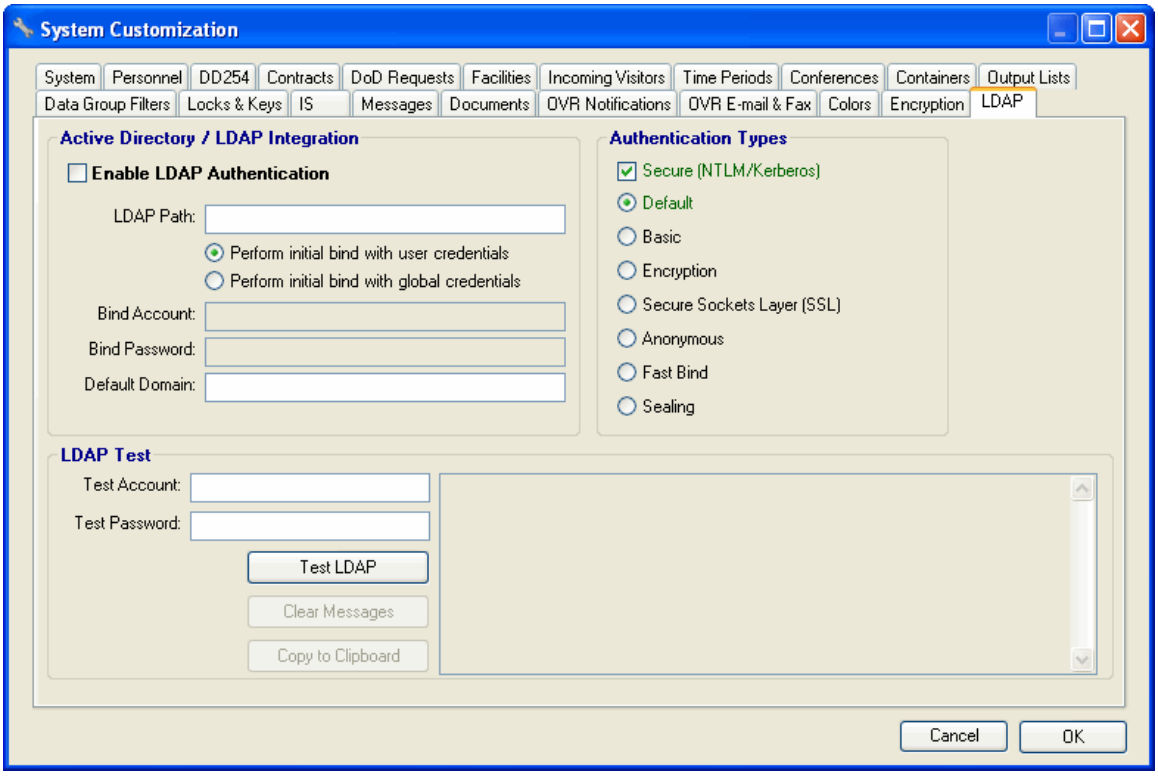
            SELECT  @RowID = MIN(ID)

            FROM    Visitors
```

```
            WHERE   Visitors.ID > @RowID

        END
```

System Customization LDAP



For more information about using this screen, see Input Screen.

System Customization, LDAP Page Fields

Field Name	Description
Enable LDAP Authentication	Check this box to use Lightweight Directory Access Protocol (LDAP) to authenticate SIMS users when they login and to enable Default Domain and LDAP path.
LDAP Path	Specify the LDAP directory path, type of login credentials, account name and password information.
Default Domain	LDAP default domain name.
LDAP Test	Enter the user name and password and then choose the Test LDAP button. Messages will appear indicating whether or not the LDAP connection is operational.
Default	Use basic authentication (simple bind) in the LDAP provider.

Secure	Requests secure authentication. When this flag is set, the WinNT provider uses NTLM to authenticate the client. Active Directory Domain Services uses Kerberos, and possibly NTLM, to authenticate the client.
Encryption	Attaches a cryptographic signature to the message that both identifies the sender and ensures that the message has not been modified in transit.
Secure Sockets Layer	Attaches a cryptographic signature to the message that both identifies the sender and ensures that the message has not been modified in transit. Active Directory Domain Services requires the Certificate Server be installed to support Secure Sockets Layer (SSL) encryption.
Read only Server	For a WinNT provider, ADSI tries to connect to a domain controller. For Active Directory Domain Services, this flag indicates that a writable server is not required for a serverless binding.
Anonymous	No authentication is performed.
FastBind	Specifies that ADSI will not attempt to query the Active Directory Domain Services objectClass property. Therefore, only the base interfaces that are supported by all ADSI objects will be exposed. Other interfaces that the object supports will not be available. A user can use this option to boost the performance in a series of object manipulations that involve only methods of the base interfaces.
Signing	Encrypts data using Kerberos. The Secure flag must also be set to use sealing.
Delegation	Enables Active Directory Services Interface (ADSI) to delegate the user's security context, which is necessary for moving objects across domains.
ServerBind	If your ADsPath includes a server name, specify this flag when using the LDAP provider. Do not use this flag for paths that include a domain name or for serverless paths. Specifying a server name without also specifying this flag results in unnecessary network traffic.

User Management

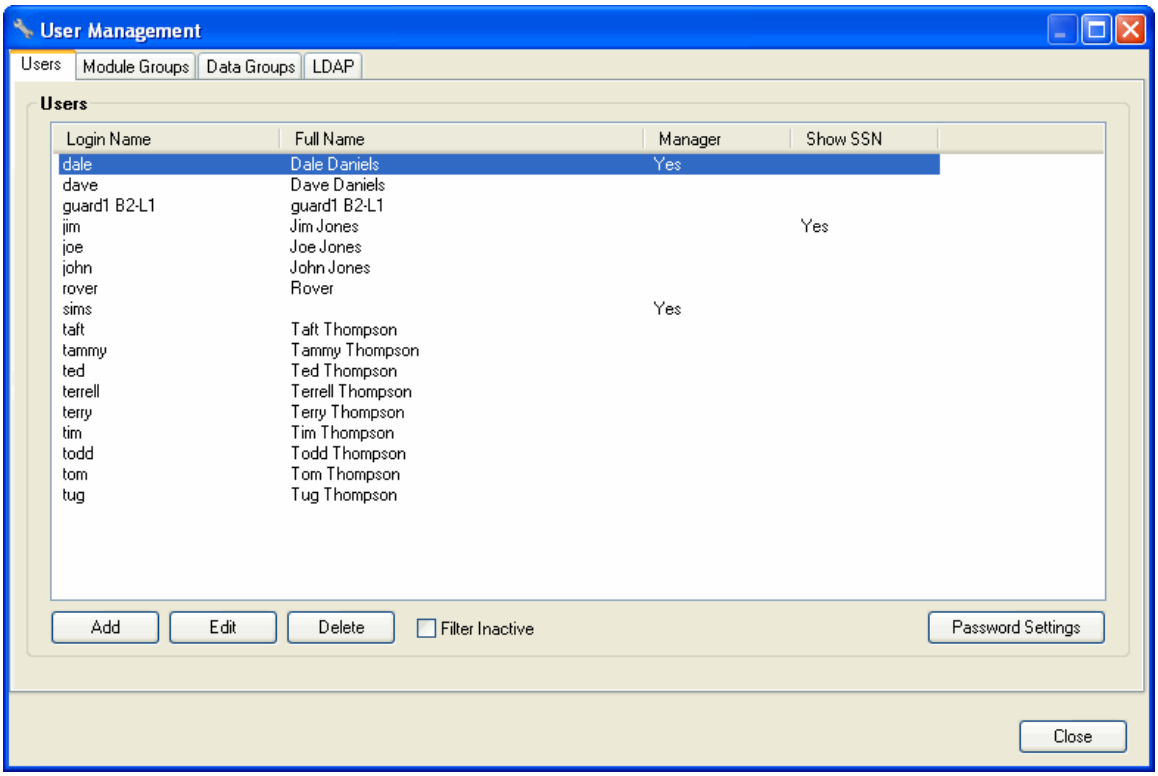
User Management

The User Management module provides the capability to manage user access to data and information, organize and define user module groups, as well as, data groups.

Users
Module Groups
Data Groups
LDAP

User Management Users

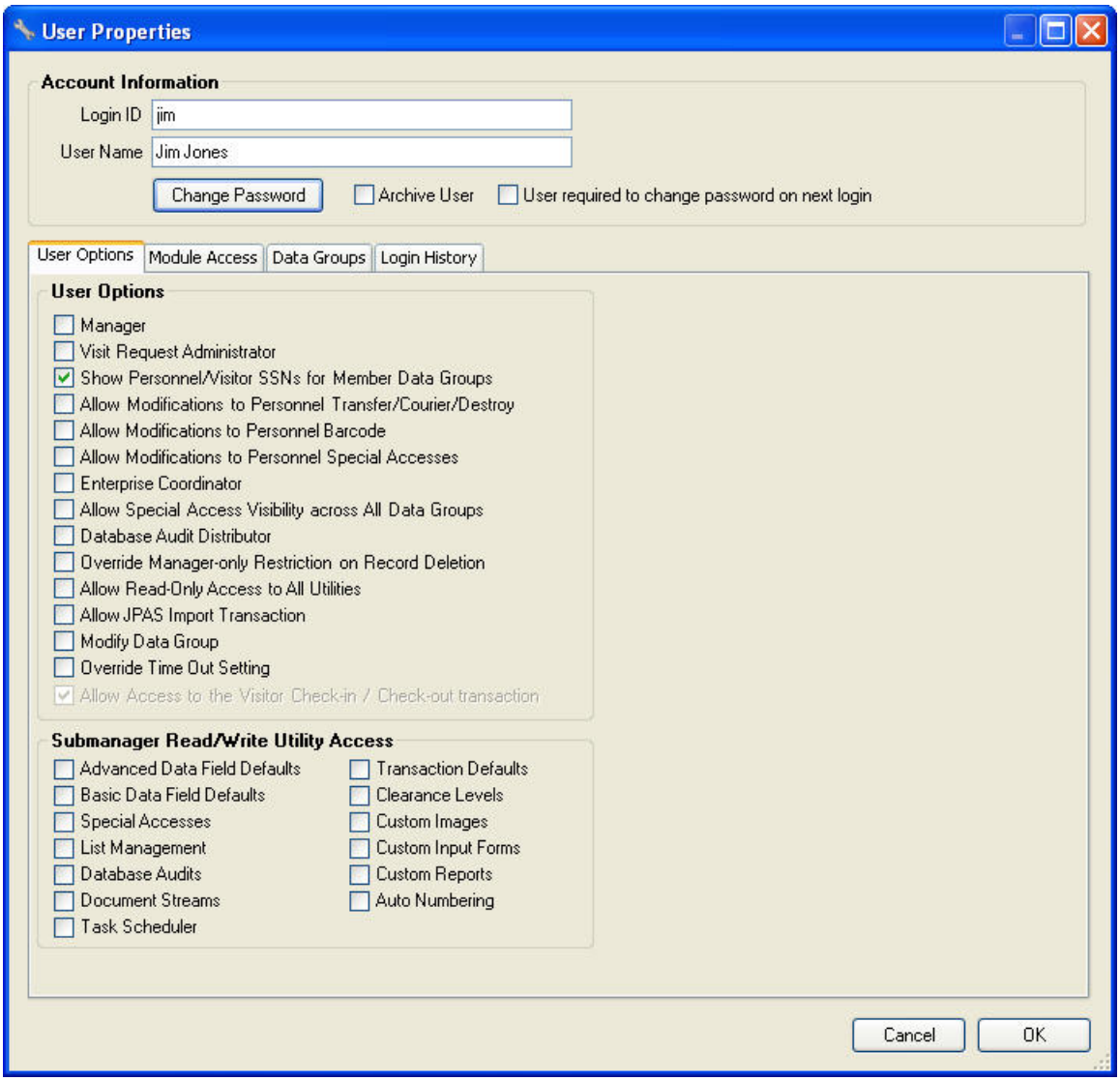
The User Management 'Users' tab allows a SIMS Manager to define user properties and access privileges when adding or editing a user. It also provides the capability to delete users. A SIMS Manager has full access to add/edit/delete users. A Submanager has read only privileges to User Management only if user option to have "read only access to all utilities" is checked under the user's options.



For more information about using this screen, see Input Screen.

Password Settings(i.e. minimum password length, days until password expires, etc.) are available by selecting this option. A SIMS manager can select an option within this dialog to force all SIMS users (LDAP excluded) to change their password during the next login session. The password can then be set in the User Properties screen as shown below.

The following User Properties screen appears when the **Add** or **Edit** buttons are selected:



For more information about using this screen, see Input Screen.

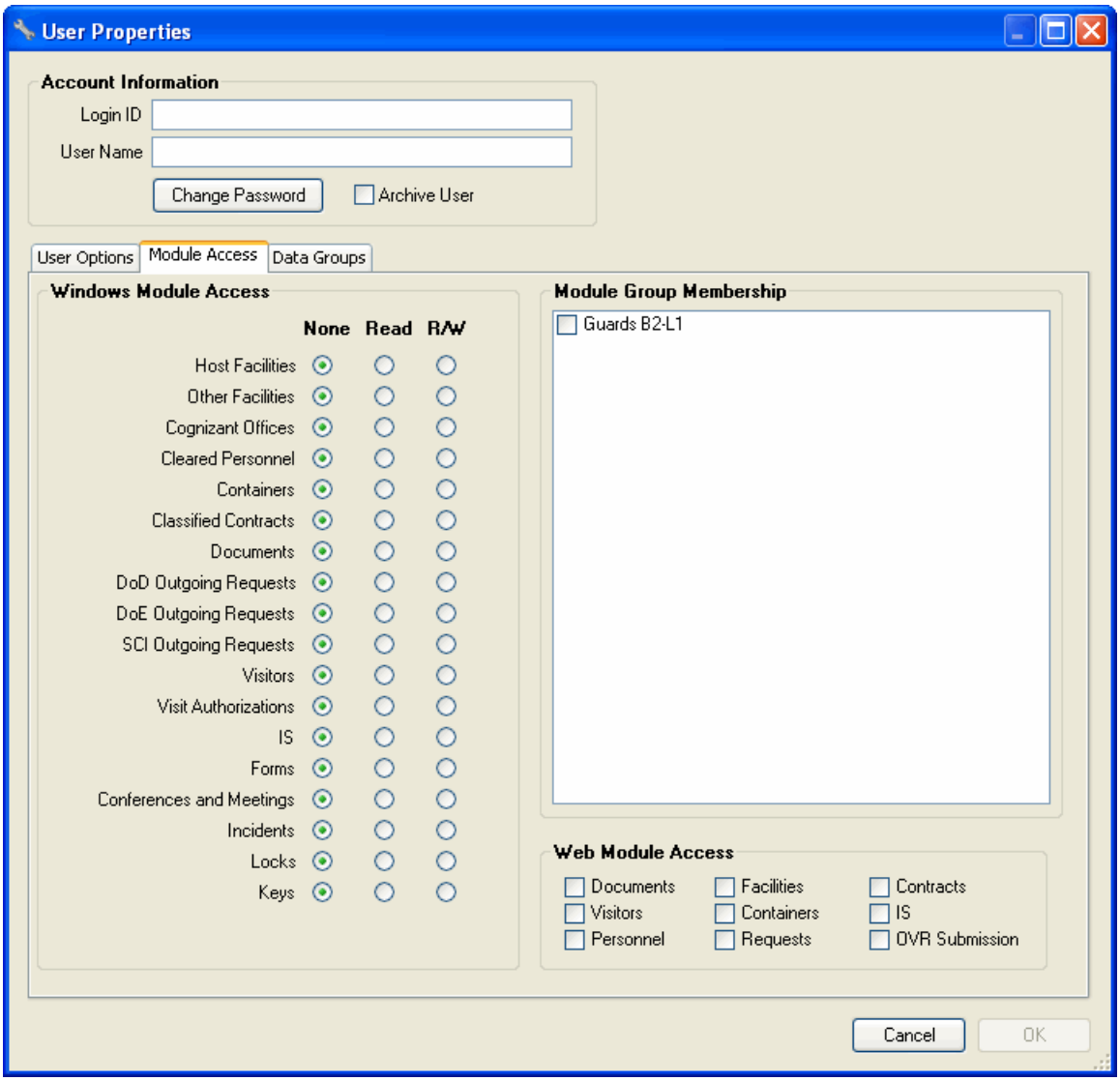
User Management, User Options Page Fields

Field Name	Description
Login ID	The login of the user. Each user's Login ID code must be unique and may contain up to 50 alphanumeric characters. Last names or last names combined with first initials are often convenient and easily remembered user IDs.
User Name	The full name of the user.

Change Password	Select this button to edit the password for the user. If the password is the same as the user name, the user will not be able to login to the SIMS Client. The user will be restricted to web access only. For more information on how this works, refer to the section on Web Access Bypass. Users (excluding those logging in using LDAP / Active Directory authentication) can also change their passwords from the Main screen by clicking **Change Password**.
User required to change password on next login	If checked, the SIMS user (LDAP excluded) will be required to change their password during the next login session. This option is an individual setting for the specific user. Instead of checking this option individually for specific users, a SIMS Manager can set this password change requirement globally for all users (LDAP excluded) under Utilities / User Management / Users / Password Settings.
Archive User	If checked, the user login will no longer be active so that the user can log in.
Manager	If checked, identifies the user as an Administrator. This user may read, add or change User IDs and Passwords. The user has access to all Utilities in both the Manager and Submanager areas.

Visit Request Administrator	This check box pertains to the capability to have people use Internet Explorer to submit DoD Visit Requests to SIMS users that have been identified as Visit Request Administrators, by having this check box checked. When that Web browser request has been submitted, the VR Admin user in SIMS is automatically notified of a Pending Request. They can then review the request, since it has been automatically entered into SIMS, and then use the buttons at the bottom of the DoD Request module input screen to send an e-mail back to the requester that the request has either been Approved of Rejected. 1) A Visit Request Administrator that is not an Enterprise Coordinator has read/write access to DoD Visit Request records within their data group but read-only to those records in a subordinate data group and no access to records in data groups either above or adjacent to them. 2) A Visit Request Administrator is an Enterprise Coordinator has read-write access to DoD Visit Request records in their data group as well as subordinate data groups, but no access to adjacent data group records.
Show Personnel/Visitor SSNs for Member Data Group	When checked, the user can view the information contained in the SSN field in Personnel records to which they have Read or Read-Write access, and access for within their Data Group.
Allow Modifications to Personnel Transfer/Courier/Destroy	When checked, the user can modify the Transfer, Courier and Destroy restriction check boxes on Personnel records to which they have Read-Write access. This checkbox overrides the ability for users to modify these fields for records outside their Data Group.
Allow Modifications to Personnel Barcode	When checked, the user can modify the contents of the Barcode field on Personnel records to which they have Read-Write access.
Allow Modifications to Personnel Special Accesses	When checked, the user can modify the Special Accesses on Personnel records to which they have Read-Write access.
Enterprise Coordinator	When checked, the user can modify the fields of Personnel records with the Read-Write privileges indicated in the table below, regardless of the user's or the Personnel record's Data Group. The table can be found under the Section User Management, Data Groups in Personnel.

Allow Special Access Visibility across All Data Groups	When checked, the user is able to see and select all Special Accesses, regardless of whether or not they are assigned to his/her hierarchical or individual data group memberships.
Database Audit Distributor	An e-mail is sent to each e-mail address specified on a data group. Each report by data group contains records that are (1) assigned to no data group, (2) assigned to current data group, or (3) assigned to any child data group. The audit results are attached as both a PDF and Excel file.
Override Manager-only Restriction to Record Deletion	If checked, the user will be able to delete records within their Data Group even though the manager-only deletion option is checked in the System Tab of the System Customization utility.
Allow Read-only Access to All Utilities	If checked and the user isn't a Manager, all Manager utilities will be available as read-only and all Submanager utilities will be available as read-only, unless specifically selected for read/write access.
Allow JPAS import transaction	If checked, the user will have permissions to execute the JPAS import transaction in the SIMS personnel module.
Modify Data Group	If checked, the user will have permissions to modify a record's Data Group without requiring administrator privileges.
Allow Access to the Visitor Check-in / Check-out transaction	Enabled by default for all current users with read/write access to the Visitors module. If the Visitors module access is read-only, checking this option will grant the user access to the check-in/check-out transactions in the visitor module menu.
Override Timeout Setting	If checked, the timeouts set in System Customization will not apply for the user.
Submanager Read/Write Utility Access	If any one of the utility options is checked, the user will have read/write access to that utility. The user will be able to add/edit/delete items in the utility only within their Data Group. If a Submanager utility is not checked, there will be no access to the utility unless the option "Allow read-only access to all utilities" is checked.



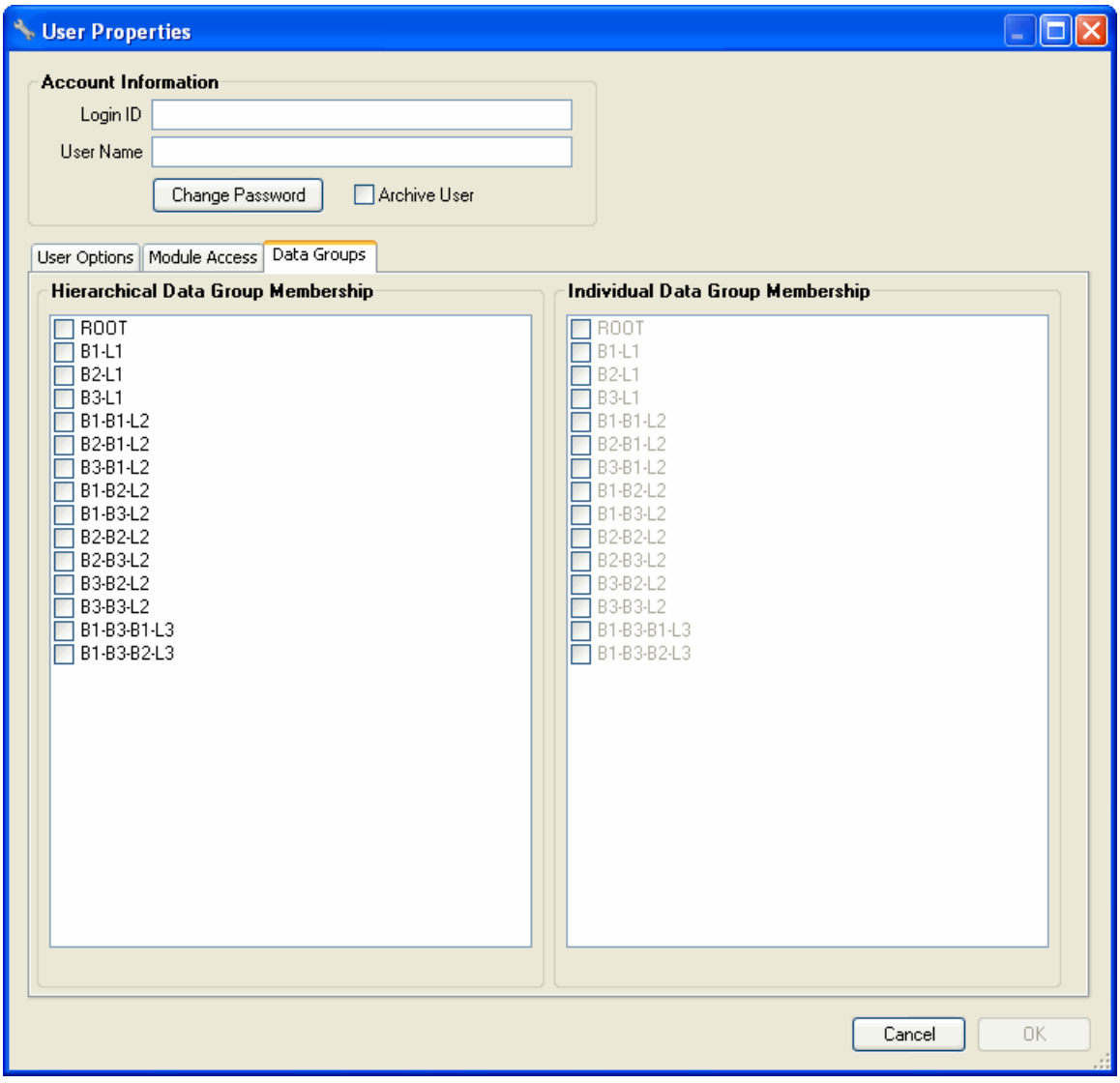
For more information about using this screen, see Input Screen.

User Management, Module Access Page Fields

Field Name	Description
Windows Module Access	Authorization in various security areas is defined by three radio button categories: None, Read, and Read/Write (R/W). These radio button settings dictate what type of access each user has, if any, to each SIMS module.
Module Group Membership	If Module Groups have been previous defined, a user can be assigned to a particular Module Group and that will automatically determine the user's Module Access privileges.

Web Module Access	Read-only access is provided via a Web browser to the checked SIMS modules. The OVR Submission option restricts the access so that the user can submit DoD Outgoing Visit Requests but not to search for the requests or have access to the DoD Requests module. To restrict the module access, leave the Requests check box unchecked.

User Management, Data Groups in Personnel



For more information about using this screen, see Input Screen.

User Management, Data Groups Page Fields

Field Name	Description

Hierarchial Data Group Membership	If Data Groups have been previously defined in the User Management > Data Groups tab, a user can be assigned to a particular Data Group and that will automatically determine the user's access to various types of records in the SIMS database. This is particularly useful for segregating records by facility association, so that users that work at a particular facility or group of facilities only have access to records associated with those facilities. See the table below which summarizes how the personnel module is affected by data groups. Note: Only one check box can be selected in the Hierarchical Data Group Membership area.
Individual Data Group Membership	Multiple check boxes can be selected in the Individual Data Group Membership area and all Data Groups so selected have the opportunity for Read/Write access to selected records in that Data Group. Note: A selection must always be made in the Hierarchical Data Group Membership area, if a selection is to be made in the Individual Data Group Membership area.

Once Data Groups are created and assigned to a user, filtering is controlled by going to the System Customization Data Group Filters tab.

Below is a summary of how Data Group membership affects read/write privileges in the Personnel Module. If the check box for Enterprise Coordinator is checked, the user will have the read/write privileges shown below. The other two cases illustrate how privileges are affected by a user's data group.

Tab (Fields)	**Enterprise Coordinator**	**Within Data Group**	**Outside Data Group**
Home (Authorized To Check Boxes)	**RW**	**RW**	**RO / E3**
Home (Barcode)	**RO / E4**	**RW**	**RO / E4**
Home (All Other Fields)	**RW**	**RO**	**RO**
Clearances (All)	**RW**	**RO**	**RO**
Special Accesses (All)	**E1**	**E2**	**E5**
Employment (All)	**RW**	**RO**	**RO**
Personal (All)	**RW**	**RO**	**RO**

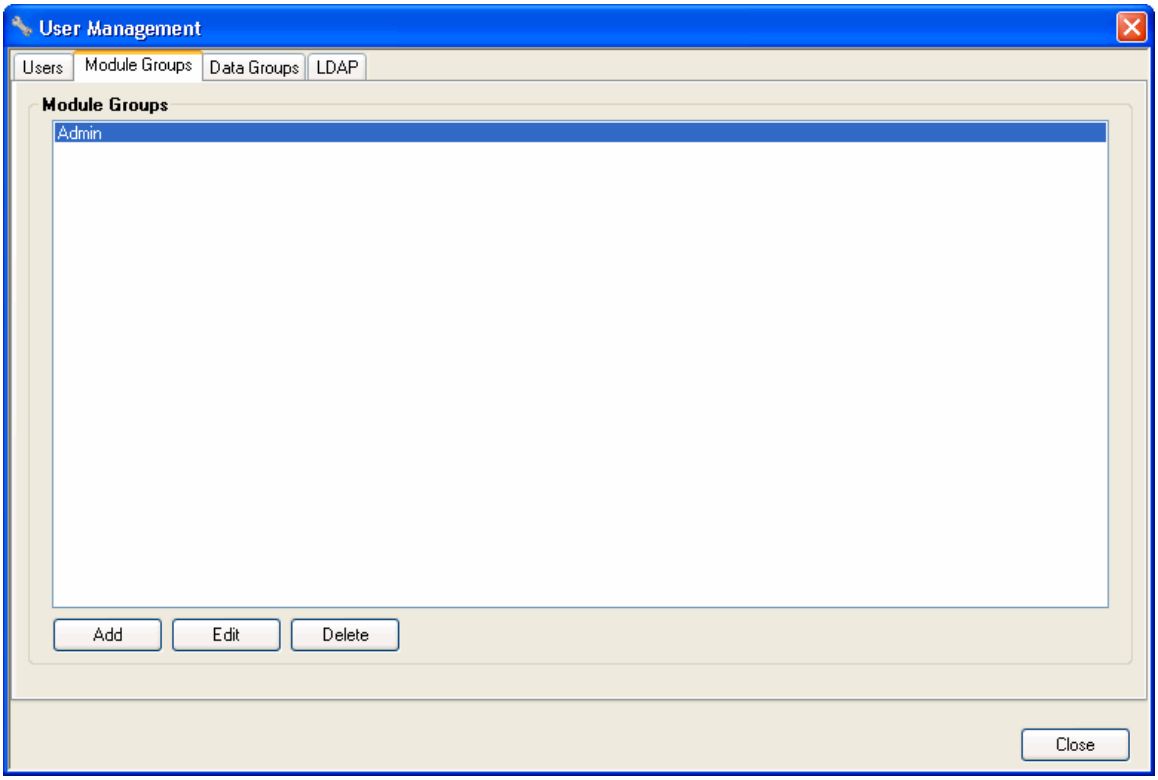
Citizenship (All)	**RW**	**RO**	**RO**
Photo & Signature (All)	**RO**	**RW**	**RO**
Badges (All)	**RO**	**RW**	**RO**
Training (All)	**RW**	**RW**	**RO**
Contacts (All)	**RO**	**RW**	**RO**
Contracts/Vehicles (All)	**RO**	**RW**	**RO**
Military (All)	**RO**	**RW**	**RO**
Foreign Travel / Contacts (All)	**RO**	**RW**	**RO**
Remarks (All)	**RW**	**RW**	**RO**
Links (All)	**RO**	**RW**	**RO**
HR Activity (All)	**RW**	**RO**	**RO**

Legend
RO = Read Only
RW = Read / Write
E1 = Exception: RW only for Special Accesses without a Data Group assignment, RO otherwise.
E2 = Exception: RW if in same Data Group, RO otherwise.
E3 = Exception: RO unless "Allow Modifications to Personnel Transfer/Courier/Destroy" check box in User Management utility is checked for the user.
E4 = Exception: RO unless "Allow Modifications to Personnel Barcodes" check box in User Management utility is checked for the user.
E5 = Exception: RO unless "Allow Modifications to Personnel Special Accesses" check box in User Management utility is checked for the user and the Special Access is in the user's Data Group.

User Management, Enterprise Coordinator
An Enterprise Coordinator can read/write to all Personnel SSN fields, regardless of the respective Data Group assignments.
When an Enterprise Coordinator type user adds a new Other Facility record, a notification will appear which will allow the data group to be blanked upon saving the record if the following conditions are met: (1) user not administrator, (2) user is Enterprise Coordinator, (3) user is in a Data Group, (4)Other Facility record is new, (5) specified clearance Level rank is > 0.

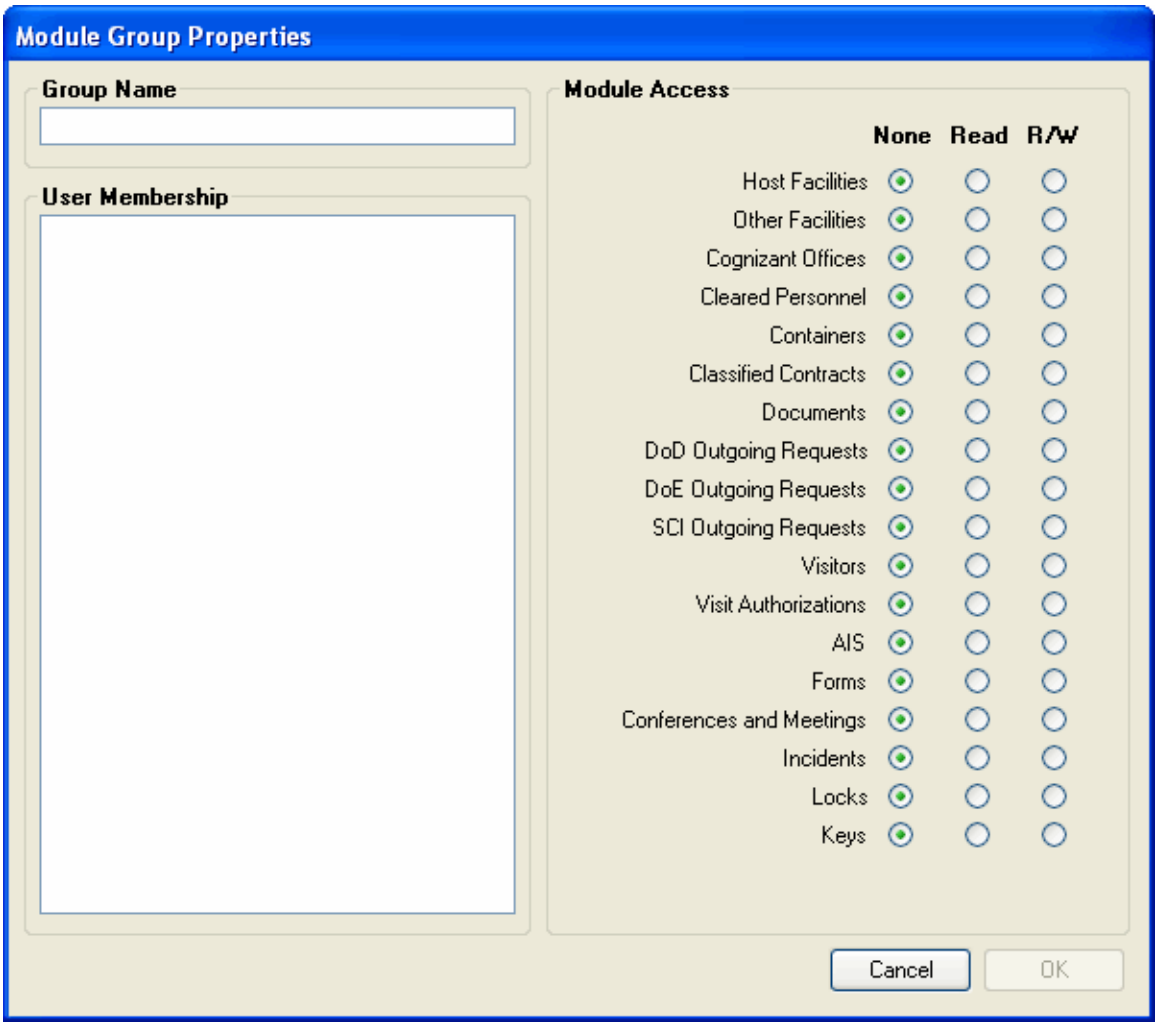
User Management Module Groups

The User Management 'Module Groups' tab allows you to view, add, modify, define and delete module groups and their access privileges.



For more information about using this screen, see Input Screen.

The following Group Properties screen appears when the **Add** or **Edit** buttons are selected:



For more information about using this screen, see Input Screen.

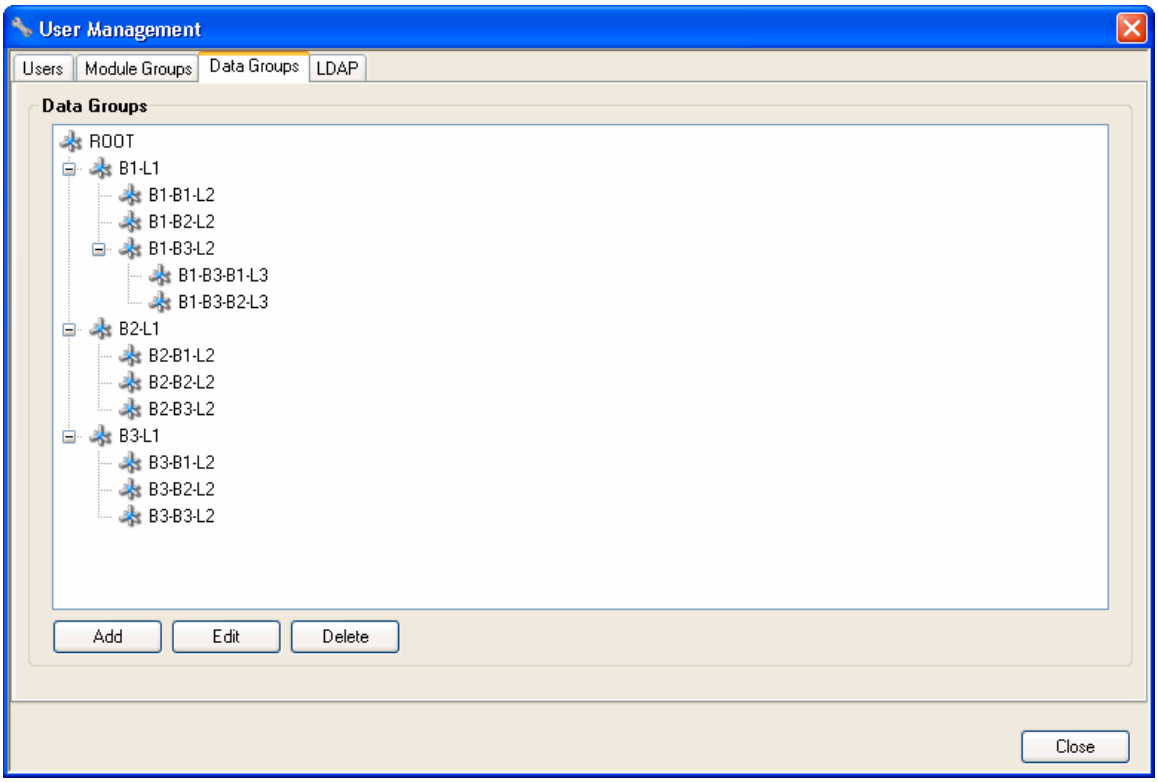
User Management, Group Properties Page Fields

Field Name	Description
Group Name	The name of the group selected or enter the name of the group to be added.
Members	This list indicates which SIMS users are members of the selected module group. If checked, the user is a member of the group.
Data Group Members	If Data Groups have been previously defined, a group can be assigned to a particular Data Group and that will automatically determine the group's access to various types of records in the SIMS database.

Module Access	Authorization in various security areas is defined by three radio button categories: None, Read, and Read/Write (R/W). These radio button settings dictate what type of access each group has, if any, to each SIMS module. If a group has 'Read' access to a particular module they must double-click on a record to open it, since the Add, Edit, and Delete functions are disabled.

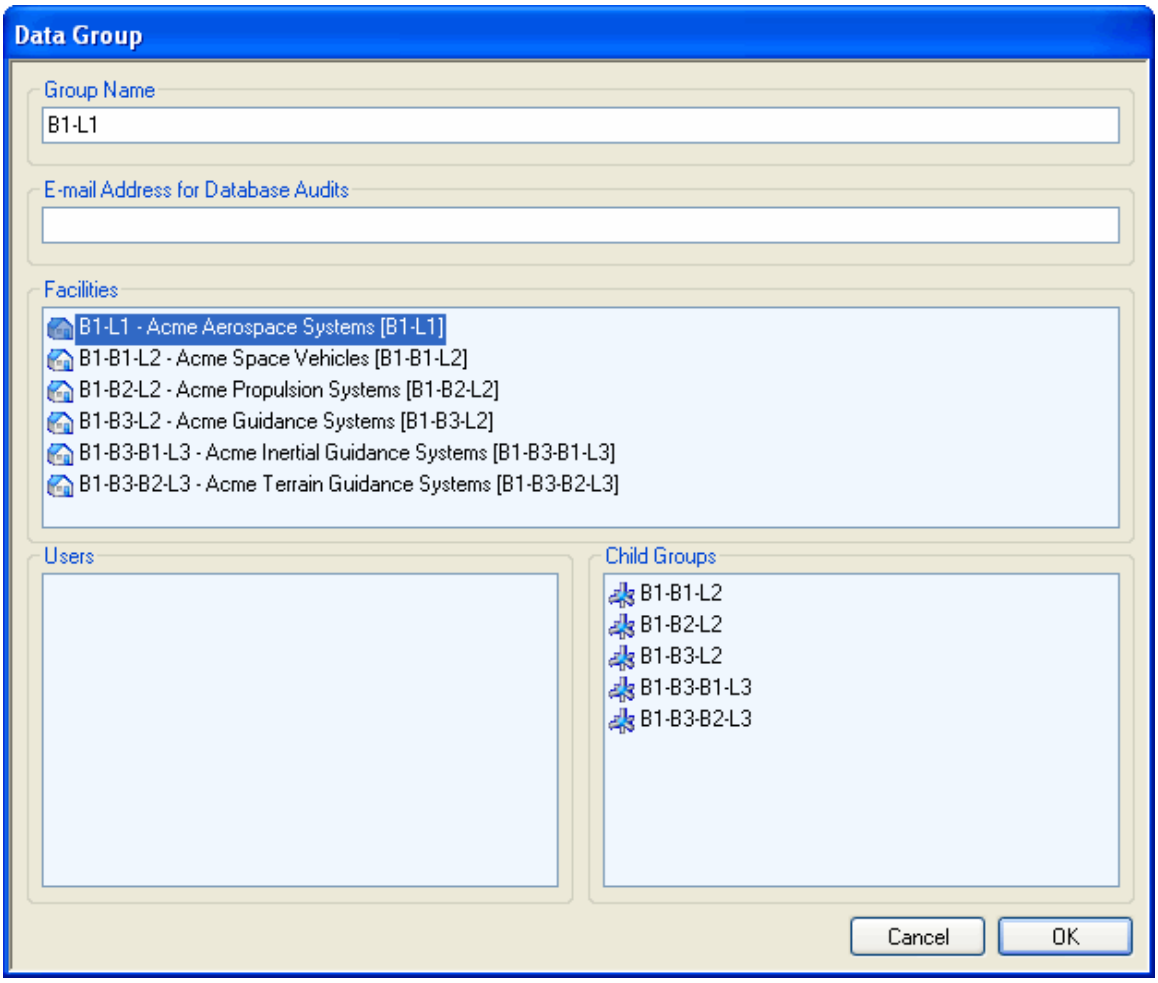
User Management Data Groups

The User Management 'Data Groups' tab allows Managers to add, modify, and delete data groups and their properties. Submanagers have the ability to view the data groups, but they can not make changes.



For more information about using this screen, see Input Screen.

The following Data Group screen appears when the **Add** or **Edit** buttons are selected:



For more information about using this screen, see Input Screen.

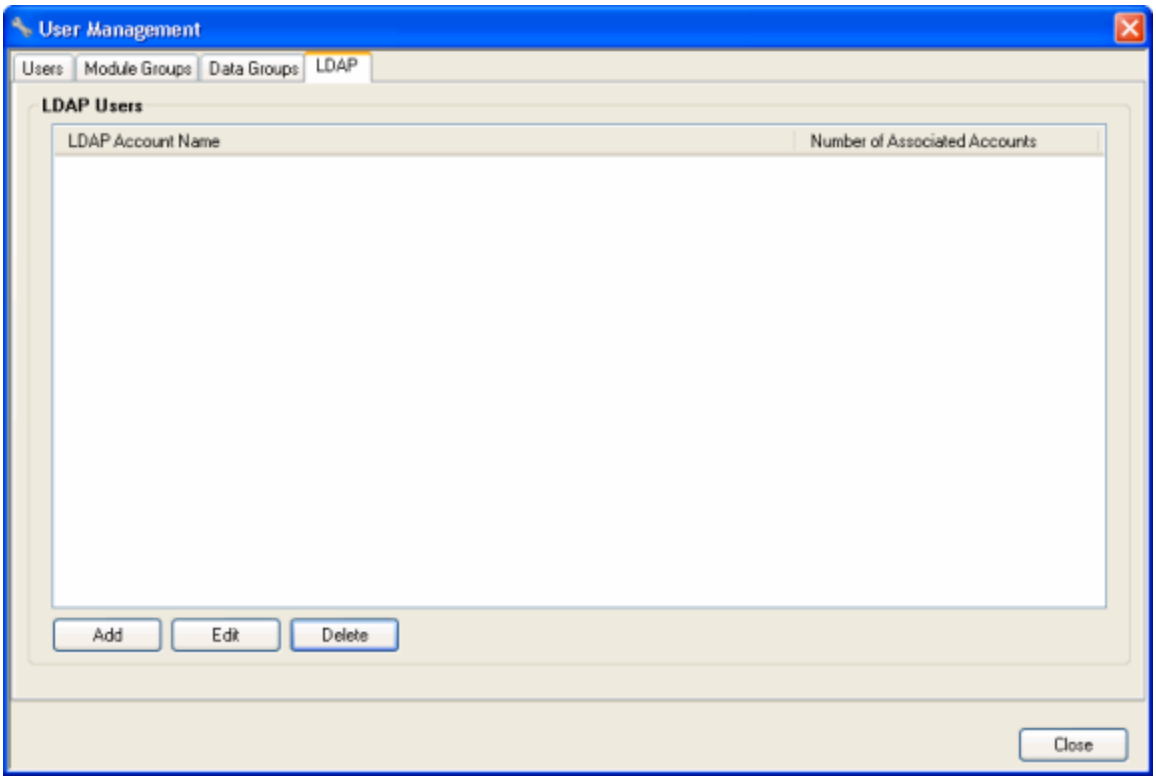
User Management, Data Group Page Fields

Field Name	Description
Group Name	The name of the data group selected or enter the name of the data group to be added.
E-mail Address for Database Audits	An e-mail is sent to each e-mail address specified on a data group. Each report by data group contains records that are (1) assigned to no data group, (2) assigned to current data group, or (3) assigned to any child data group. The audit results are attached as both a PDF and Excel file. The time in which the email is sent is set by Automated DB Audits in System Customization.
Facilities	The facilities that belong to the data group.
Users	The users that are assigned to the data group.

Child Groups	The data groups that are children of the data group that appears in the Group Name edit box.

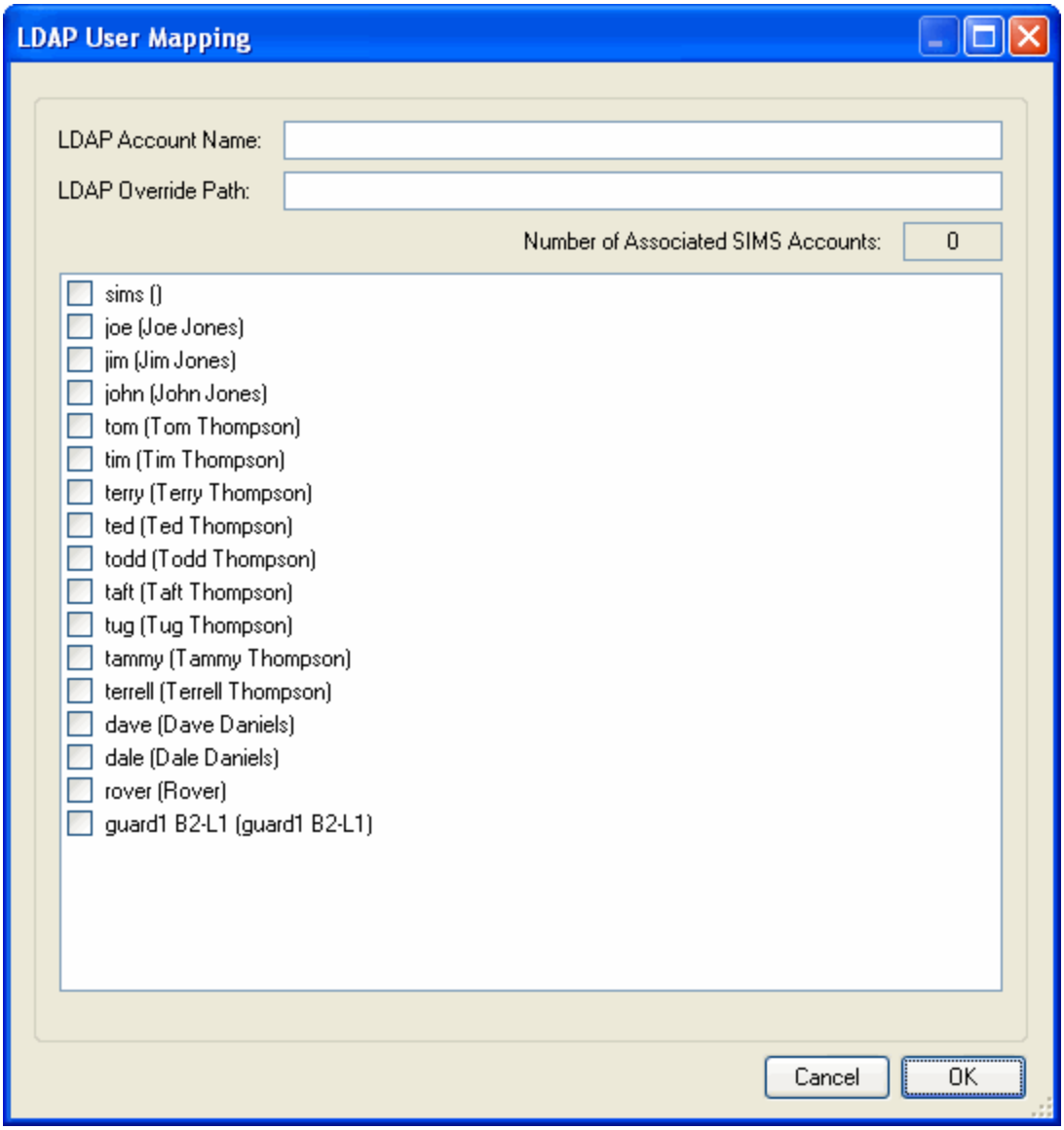
User Management LDAP

The User Management 'LDAP' tab allows you to view, add, modify, and delete LDAP accounts.



For more information about using this screen, see Input Screen.

The following LDAP User Mapping screen appears when the **Add** or **Edit** buttons are selected:



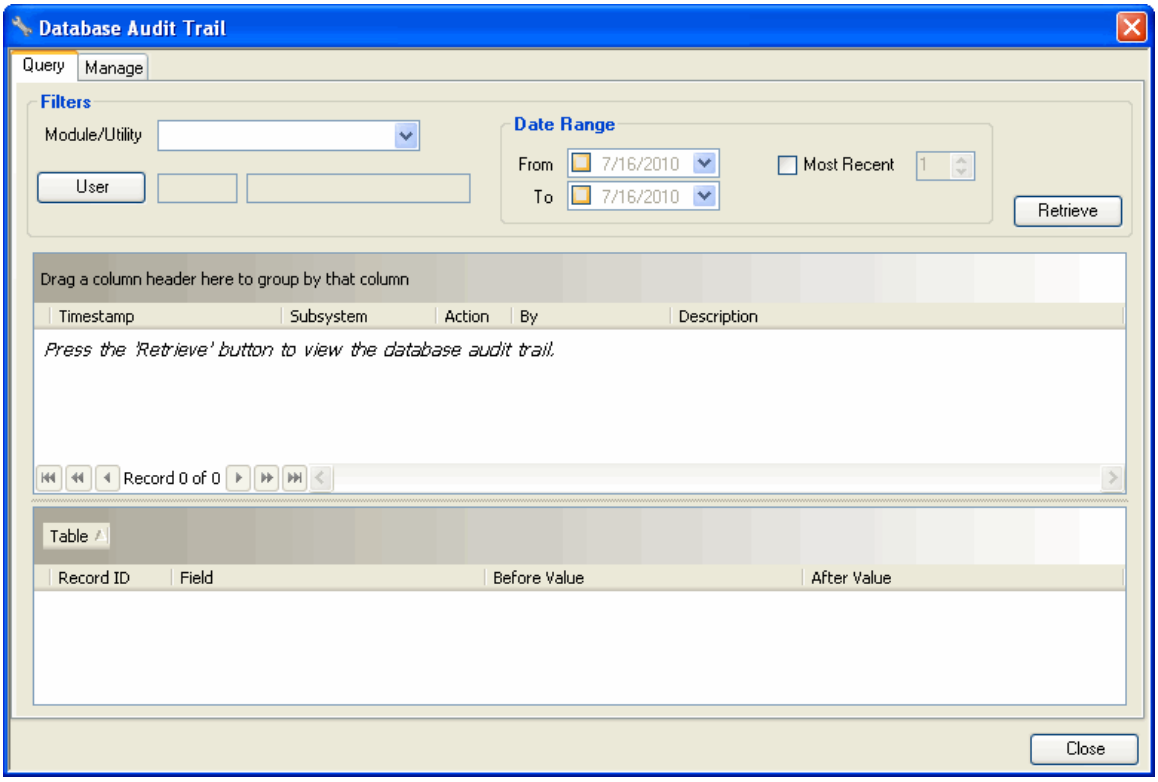
For more information about using this screen, see Input Screen.

User Management, LDAP Page Fields

Field Name	Description
LDAP Account Name	The name of the account added or edited. Select the users that will have access to the LDAP Account. Some users will have multiple SIMS.NET accounts setup.. A single LDAP account would then be used to group those multiple accounts for the same user into a single LDAP account that the user can select from at LDAP login time.
LDAP Override Path	Specify a LDAP path to be used for each data group instead of the one used in System Customization. All other values will still be pulled from System Customization.

Database Audit Trail

The Database Audit Trail utility allows managers to view every change down to the column level, including old and new values. Audit data can be accessed from the input form of a particular record or from the Utilities module.



For more information about using this screen, see Input Screen.

Database Audit Trail

Field Name	Description
Module/Utility	Select the module or utility in which to run a report.
Date Range	Specify the date range in which the changes were made. When the retrieve button is selected, only changes within the specified date range for the selected module/utility will display.
Most Recent	If checked, specify a number. The specified number of most recent changes will be displayed. This can be used along with "date range" to query the most recent changes within a date range.
Timestamp	The timestamp that the modification was made.

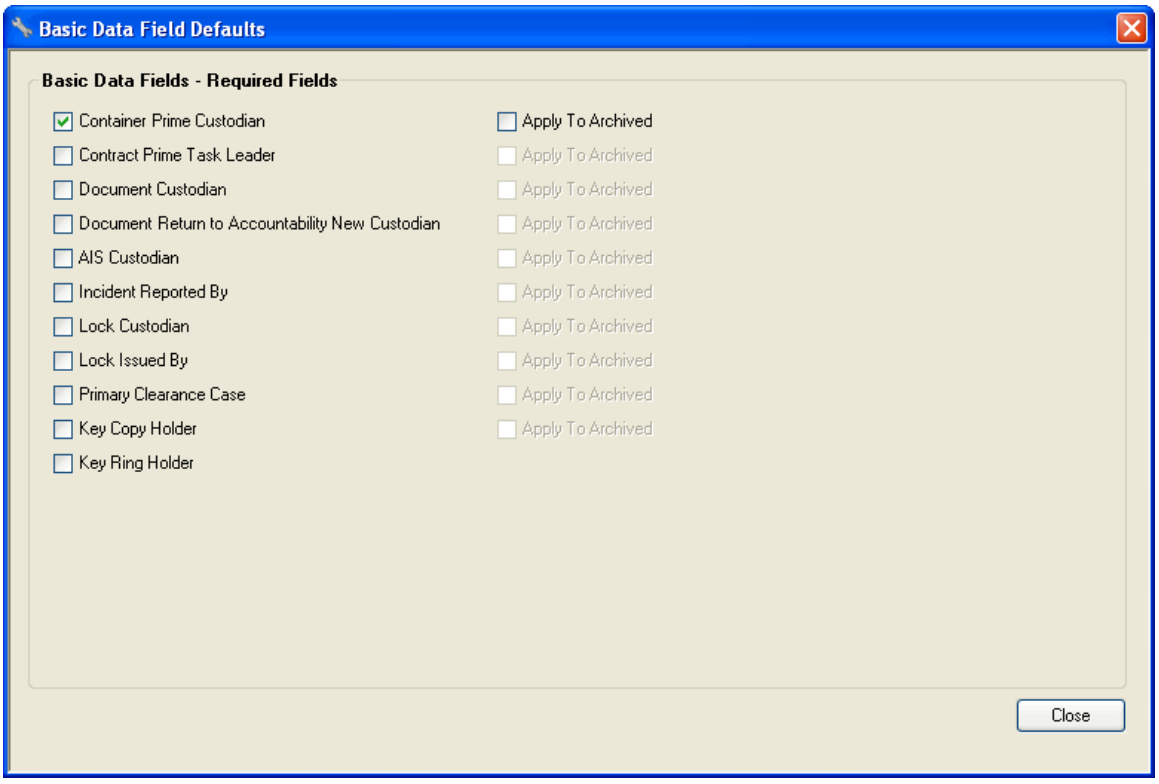
Subsystem	The subsystem in which the change was made.
Action	The type of action (i.e. edit).
By	The user that performed the change.
Description	A description of the change (i.e. record number).

Data Field Defaults

Data Field Defaults is for specifying field values that will be filled in automatically when a new record is added to SIMS. The Data Field Defaults screen allows you to identify which fields have "sticky" values (ones that retain the last entered value as the new default) as well as which fields are required to contain data in order for the record to be saved.

Managers have full access to make changes to the Basic DFD that appears at the Manager Utilities level and to the Data Field Defaults that appear at the Submanager level. A Submanager has access only to add or modify fields within the Data Field Defaults Utility.

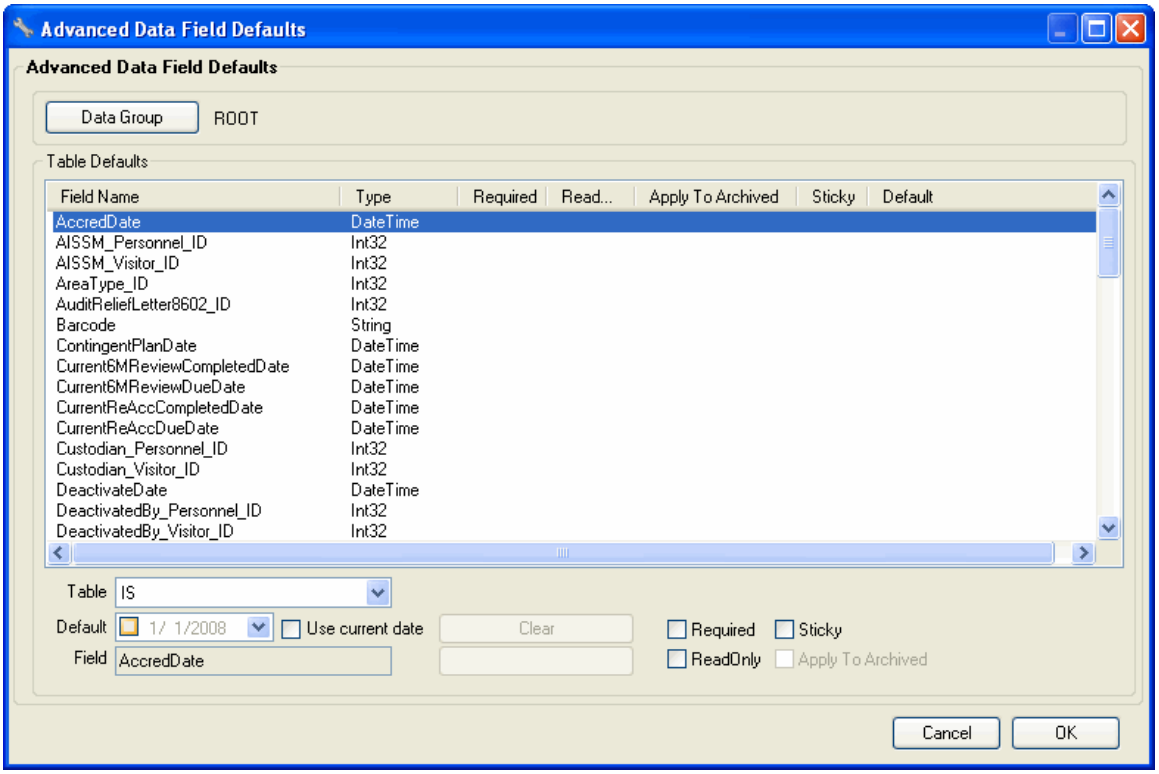
Basic Data Field Defaults



For more information about using this screen, see Input Screen.
Basic Data Field Defaults

Field Name	Description
Required Fields	Check the box if the user must enter a value for the selected field, in order to save the record. Only SIMS Managers can make changes to these fields. A Submanager can view the settings.
Apply to Archived	Check this box if the field should be required when saving an archived record.

Advanced Data Field Defaults



For more information about using this screen, see Input Screen.

Data Field Defaults

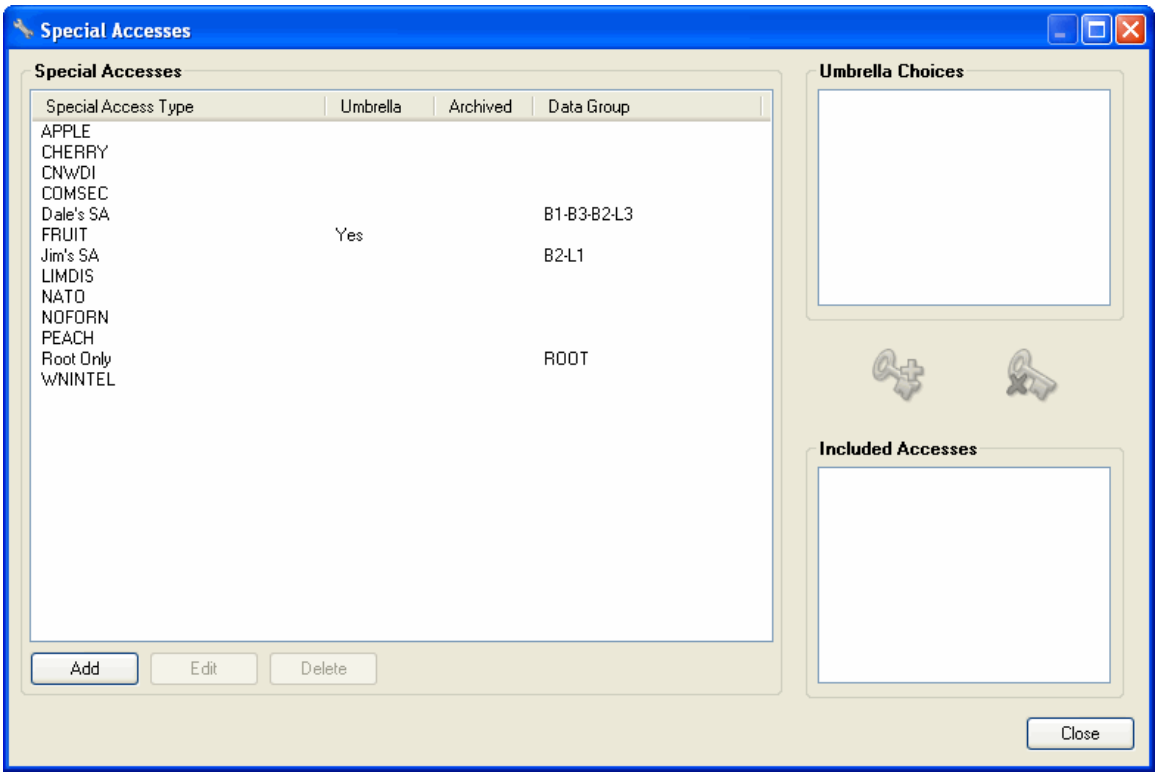
Field Name	Description
Table	Select a table to assign default values to fields.
Field	Displays the currently selected field. Click on a field name in the list above to select a field.
Default	Displays the field name default.

Required	Check this box if the user must enter a value for the selected field, in order to save the record.
Sticky	Check this box if you want the value for the selected field to carry over to the next record when the user adds several records at once.
Read Only	Check this box if the default value for the selected field should appear as read only.

Special Access Definitions

Special Access Definitions provides a method for specifying special security accesses.

A SIMS Manager has access to add/edit/delete Special Accesses. A Submanager has access only to add/edit/delete Special Accesses within their Data Group. Items outside the Submanager's Data Group can only be viewed.



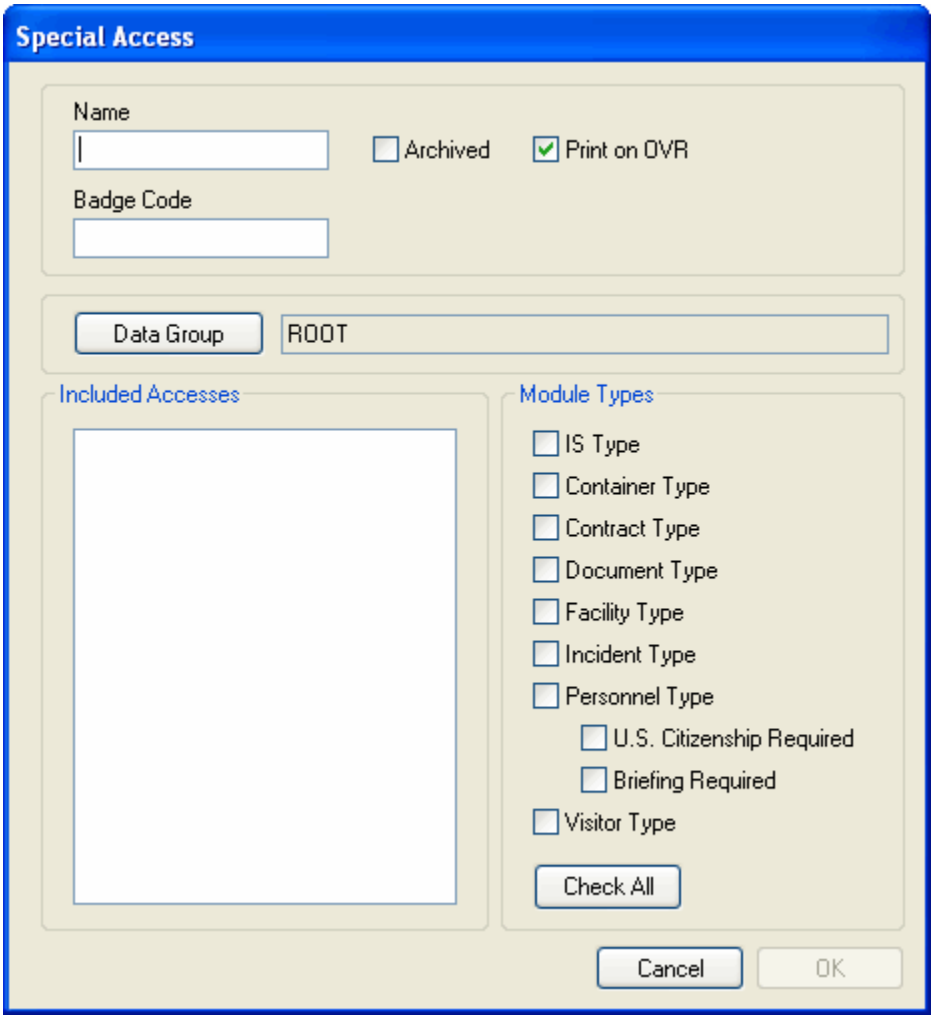
For more information about using this screen, see Input Screen.

Special Access Definitions Page Fields

Field Name	Description

Special Accesses	List the Special Accesses Types, whether they are included in an Umbrella access, and/or Archived.
Umbrella Choices	Lists 'Umbrella' special accesses which contain one or more individual special accesses. This can be used to package Special Accesses so that they will not need to be added individually in a SIMS record. Click on a special access in the Umbrella Choices list and then click the '+' key to add to the umbrella. Click the '-' key to remove a special access from an umbrella.
Included Accesses	Lists the special accesses included in the selected 'Umbrella Choices'.

The following Special Access screen appears when the **Add** or **Edit** buttons are selected:



For more information about using this screen, see Input Screen.

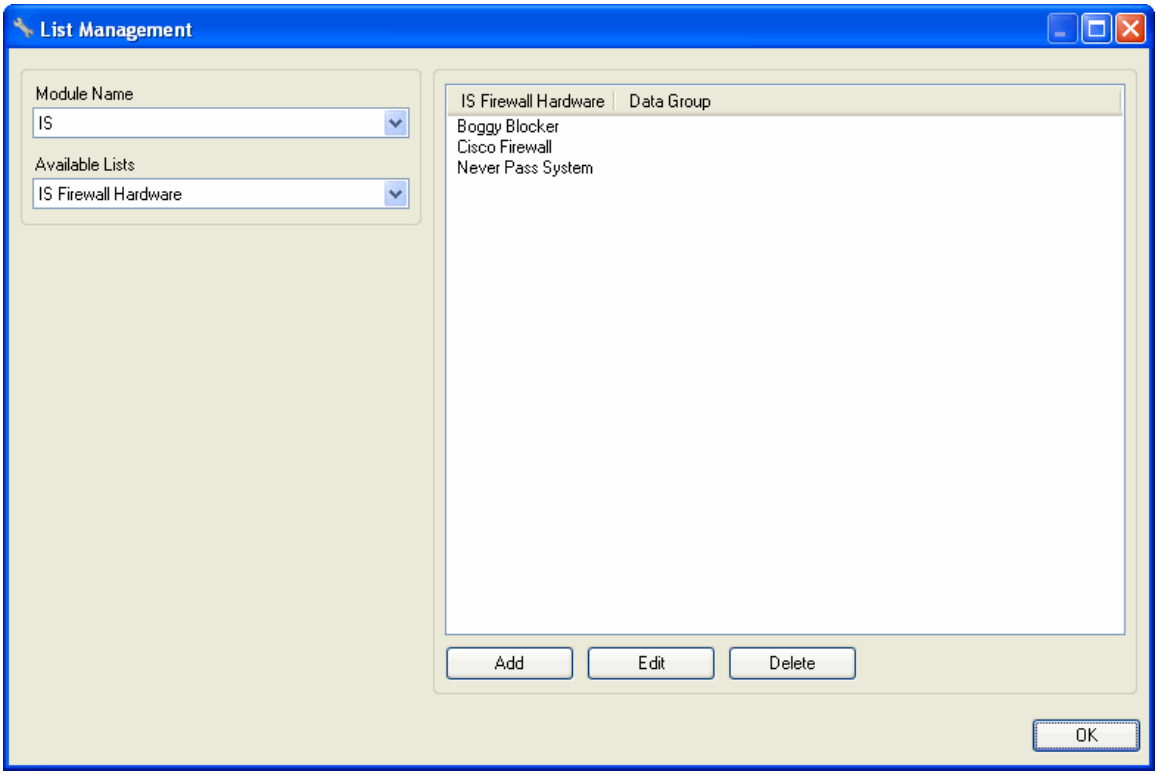
Special Access Page Fields

Field Name	Description
Name	The name of the Special Access Type selected or enter the name of the type to be added.
Archived	If checked, the Special Access Type is activated. This prevents it from appearing on pick lists.
Print on OVR	Leave this unchecked if you do not want special accesses to appear on an outgoing visit request even if the option to print special accesses is checked in the visit request report dialog.
Badge Code	A self imposed code that allows you to put a representation of an Special Access on a Badge without actually using the Special Access Name
Data Group	The data group that the Special Access belongs to. Data groups are defined in the User Management Data Groups dialog.
Included Accesses	Indicates what type of modules and/or information can be accessed associated with a security access type.
Type	Select the module type(s) of special accesses using the check boxes. For Personnel Type, there are two requirements that can be enabled. If the **U.S. Citizenship Required** che ck box is checked, and if the U.S. Citizen is not set in the personnel record, the Special Access name will not display in the Cleared Personnel Module's Special Access pick list. The U.S. citizenship requirement must be set first, and then the Special Access pick list will display the Special Access name so that it can be selected. When the **Briefing Required** is enabled, the special access will appear gray and italicized in the Personnel Special Access screen if a brief date has not been set.
Check All	Selects all of the above access check boxes.

List Management

List Management provides the capability to create and maintain pick lists.

A SIMS Manager has access to add/edit/delete list items. A Submanager has access only to add/edit/delete items within their Data Group. Items outside the Submanager's Data Group can only be viewed.



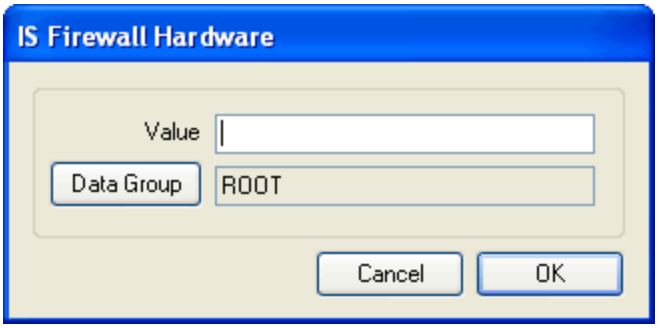
For more information about using this screen, see Input Screen.

List Management Page Fields

Field Name	Description
Module Name	Select the appropriate SIMS module from the drop down menu.
Available Lists	Select a list associated with the Module Name from the drop down menu. The list options are displayed in the text list box.

Within the List Management utility, select a module, and then choose a list you would like to create entries for. To add an entry, simply click the 'Add' button and then type in the value. By editing the data group, you can restrict who is allowed to see the value when using the pick list. If a value is outside of the user's data group, the value will not appear in the pick list. You may need to log out of SIMS and log back in for the system to refresh once you have added entries.

Note: If a main module record (i.e. Personnel, Facilities) has a value in which a SIMS user can already view a field's value, the user will continue to see the values assigned to the current records. The value, however, will no longer be available once the user selects the pick list.



Related Topics

Pick Lists and Pickers

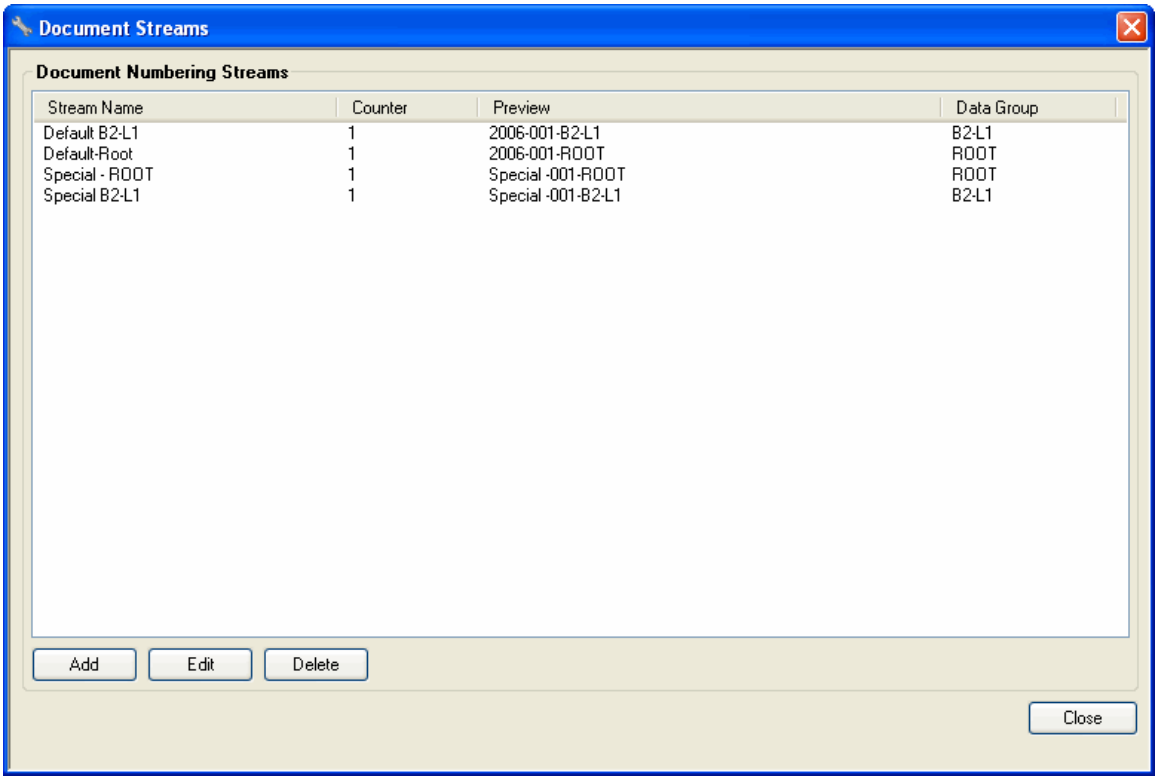
Data Groups

Document Streams

Document Streams are an automatic document numbering system. A stream is used to create the next available document number based on the way the stream is set up. The document number field appears on the Classified Documents home input screen. Different streams can be used for different document numbering schemes. Since most facilities have different document numbering systems, users can define a scheme that suit their needs.

For larger facilities, the ability to assign ranges of numbers for documents allows blocks of numbers to be assigned for a particular user or project.
Streams can be used for assigning document numbers to documents based on their classification level or project. A portion of the document number could contain the document's classification level or project ID as a prefix, with the actual document number appended.

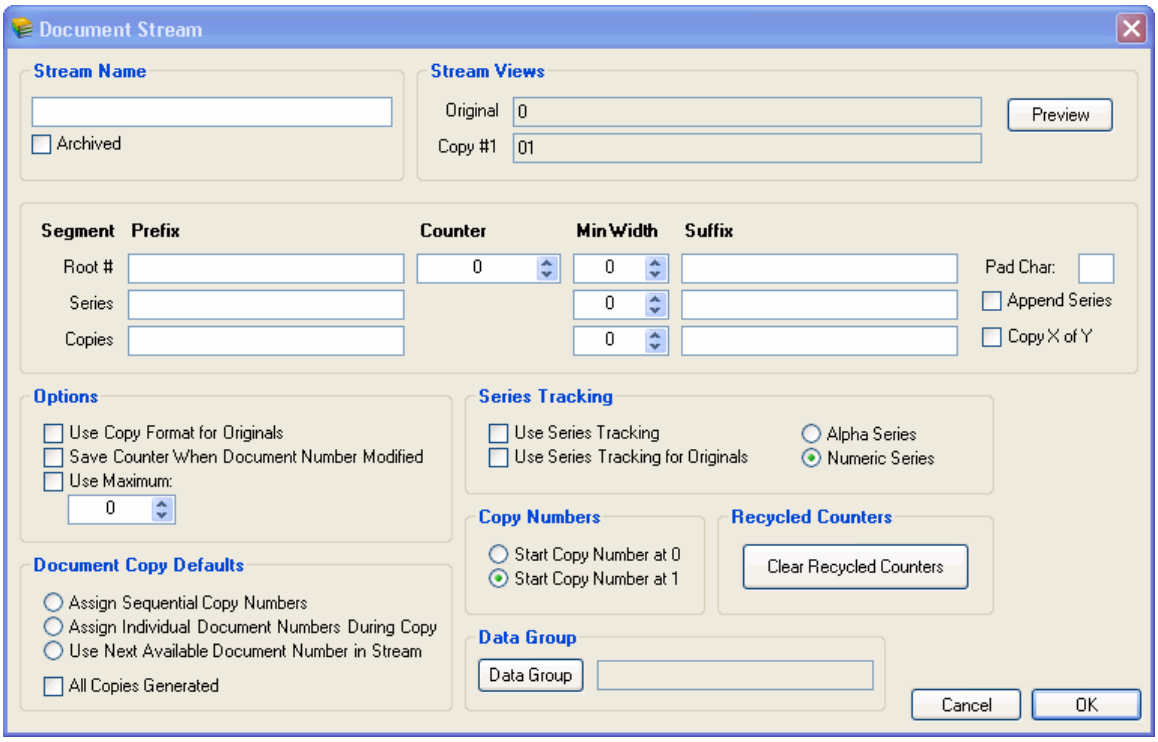
A SIMS Manager has access to add/edit/delete Document Streams. A Submanager has access only to add/edit/delete Document Streams within their Data Group. Streams outside the Submanager's Data Group can only be viewed.



For more information about using this screen, see Input Screen.

Document Streams Page Fields

Field Name	Description
Stream Name	The name of the document numbering stream.
Counter	The counter specified in the document stream.
Preview	A preview of the stream.
Data Group	The data group assigned to the document stream.



For more information about using this screen, see Input Screen.

Document Numbering Streams Sub-Page Fields

Field Name	Description
Stream Name	The name of the document numbering stream.
Archived?	In Multi-User mode, when someone first views a Stream record, it is archived/locked by default. If checked, the stream record can be modified. If another user attempts to add a document record using this stream, during the period of time that you have it unlocked, they will be put in a wait loop.
Original and Copy #1	These fields display an example of the format of what the original document control number, as well as the first copy created would look like, for the control number stream parameters specified elsewhere on this screen.

Root #	The Prefix and Suffix for this document numbering stream, such as the classification level, type of document, or project ID. The Counter automatically increments by one each time a new document is entered into the database and assigned a number from this stream. The Min. Width (minimum character width) field indicates the minimum number of digits. Numbers smaller than the minimum width are padded with zeroes. For example if the counter is "10" and the minimum width is 4 then the number will be 0010. Setting a minimum width equal to the width of the largest counter you expect to use is a good idea for proper sorting of document numbers.
Series	The Prefix and Suffix for this document numbering stream. The counter portion automatically increments (e.g., A, B, C... or 1, 2, 3...) each time that you create a new series by copying a document that subscribes to this document numbering stream. The counter portion will have the minimum number of characters.
Copies	The Prefix and Suffix for this document numbering stream. The counter portion automatically increments by one for each copy you create. The counter portion will have the minimum number of digits.
Pad	The character used to pad out to the minimum width.
Append Series?	If checked, copies of documents can be appended to a previously issued series.
Copy X of Y?	If checked, copies of documents can be numbered as "2 of 5", "3 of 10", etc.
Use Copy Format for Originals?	If checked, the format specified for document copies will also be used for original documents entered into the database.
Save Counter when Document Number Modified?	If checked, whenever a document number is offered from this document numbering stream and is subsequently not used *exactly* as offered, the originally offered number is placed back upon the stack of unused numbers 'Recycled Counters' and will be offered again, when the next document is to be added to the database.
Use Maximum?	If checked, a maximum number of documents to be entered into the database restriction can be placed on this document numbering stream.

Use Series Tracking?	If checked, series tracking can be specified as either Alpha (A, B, C...) or Numeric (1, 2, 3...).
Alpha Series	Series Tracking will use the Alpha series.
Numeric Series	Series Tracking will use the Numeric series.
Assign Sequential Copy Numbers	If selected, the next sequential number will be used as the copy number.
Assign Individual Copy Numbers during Copy	If selected, the copy number will be formatted when the copy takes place.
Use Next Available Document Number in Stream	If selected, the next available document number in the stream will be used.
All Copies Generated?	If checked, assume that all copies of a document have been generated rather than received.
Start Copy # at	The copy number may be specified as starting at 0 or 1.
Clear Recycled Counters	Remove any counters that have been recycled. This will force the next number in the counter to be the value in the Counter field.
Data Group	The data group that the document stream belongs to. Data groups are defined in the User Management Data Groups dialog.

Custom Reports

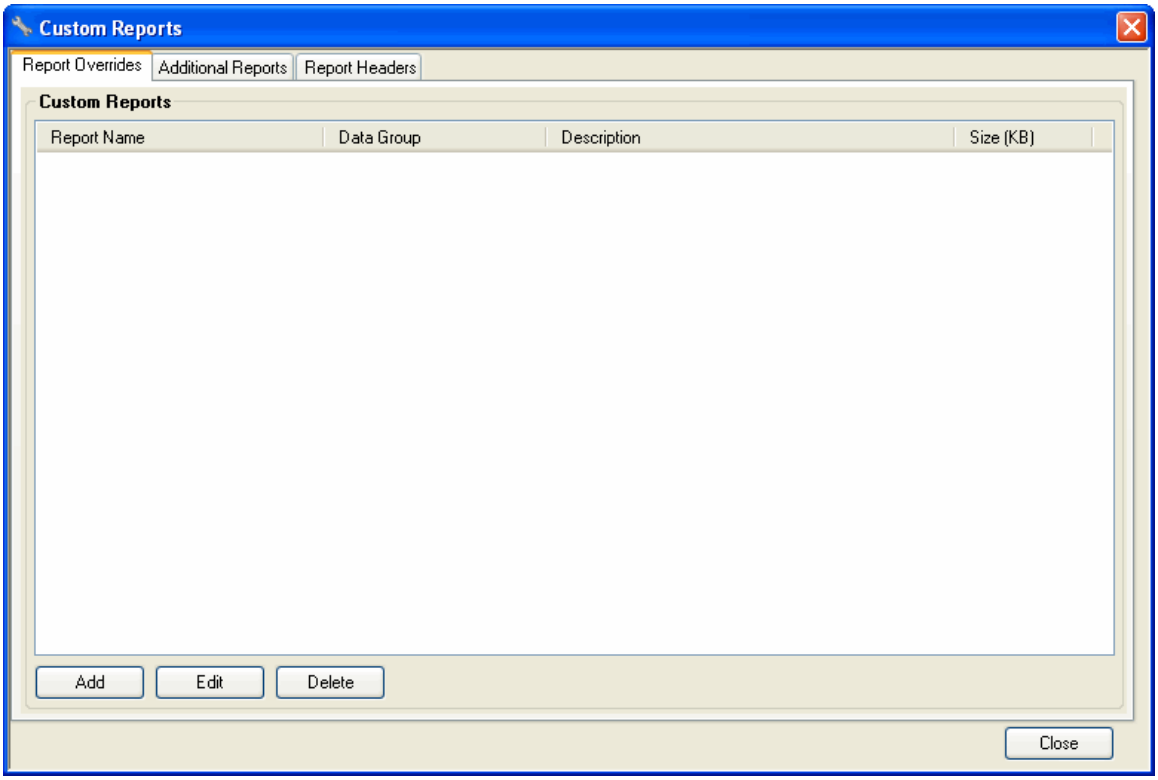
Custom Reports

Report Overrides

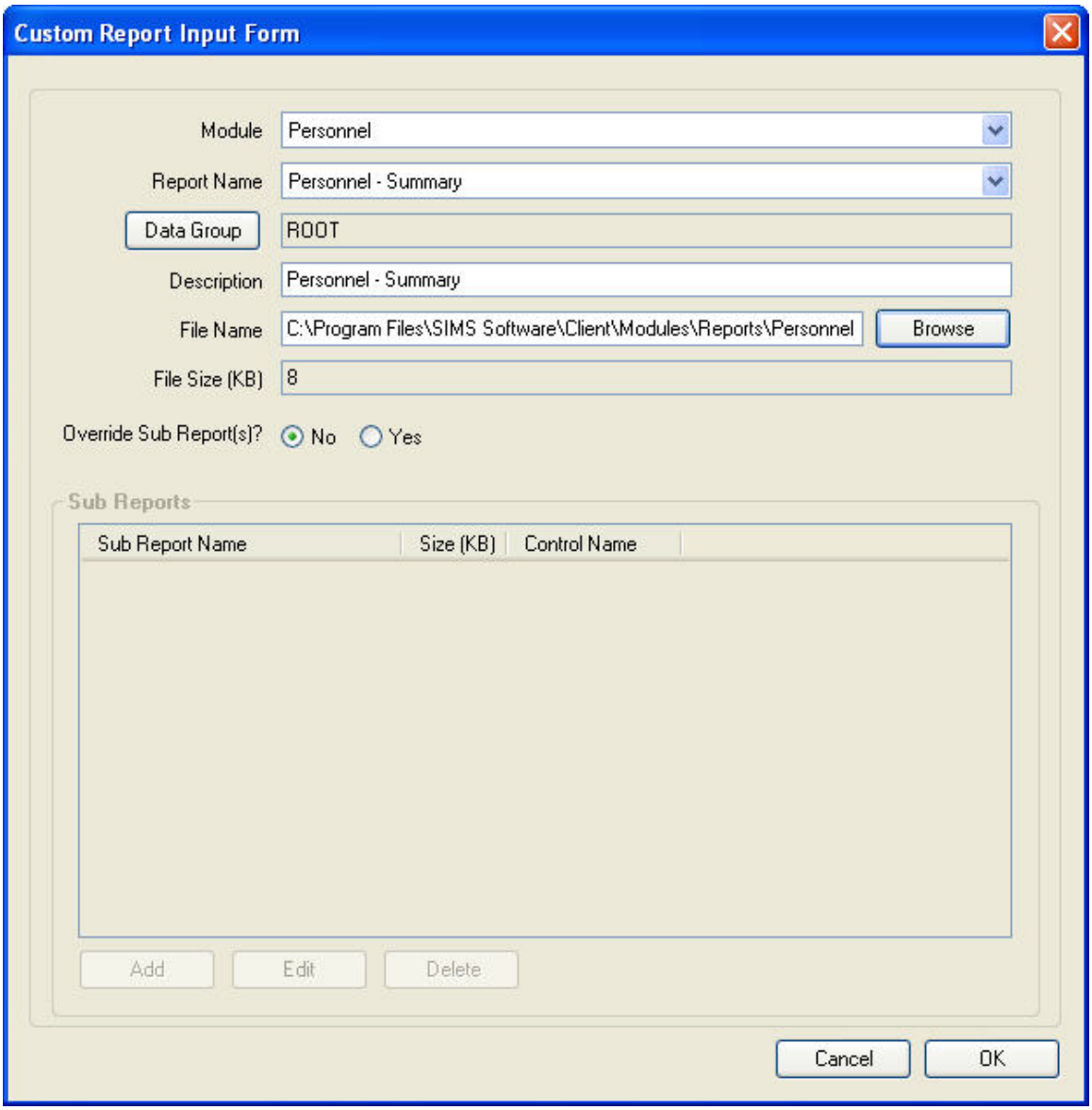
Each module in SIMS includes pre-defined reports that are accessible through the Reports menu. If you want to revise a report, you can make a copy of the .rpx file and revise it using the Design Custom Reports option in the Reports menu.

The Custom Report Overrides feature allows you to create a new name and replace the pre-defined reports. If you wish to override a pre-defined report, this can be done within the Report Overrides tab.

Managers have full read/write access to change the data group field for any report. Submanagers can only add/modify reports within their data group.



Choose the Add button to add a new report.



Custom Reports

Field Name	Description
Report Name	Select the Report Name of the report that you want to replace.
Data Group	You can filter what users will use the revised report by selecting a Data Group. Managers have full read/write access to change the data group field for any report. Submanagers can only add/modify reports within their data group.
Description	Enter a description for the report that you will be adding.

File Name	Use the Browse button to select the .rpx file. The file path will be displayed here. When selecting the .rpx file, choose the main file for the custom report.
Override Subreport	Choose "no" if the report does not use a sub-report. If the report uses a subreport, but the file was not modified, the "no" radio option should be selected. Choose "yes" if the report uses a subreport and that subreport was modified/saved using the custom report Design Editor. Next choose the Add button. In the dialog that appears, select the subreport name in the drop-down list and then browse for the custom report file. This will allow the built-in subreport to be overwritten with the custom subreport.

After adding a customized report, it will be saved in the database and will automatically be used by every SIMS user in the selected Data Group whenever the report is selected in the Reports menu. By keeping a copy of the .rpx file in a "Custom Reports" folder, you now have the ability to make further changes at a later date and then re-save that modified custom report using the Custom Reports utility, without needing to start from scratch.

Note that only one custom report can be saved in the database for each Report Name. If you attempt to add the same Report Name when one was already saved, you will be alerted that a Custom Report for this Report Name and whether or not you want to overwrite it. The only exception to this is the Visitor - Visitor Badges, where multiple custom visitor badges can be saved in the database, each with different Descriptions, so that you can pick from a list of choices when performing a Visitor Check In transaction and printing a badge. The descriptions will get added to the Badge Type list in the Visitor Registration screen.

For more information on Custom Reports, please refer to the help documentation for Custom Reports.

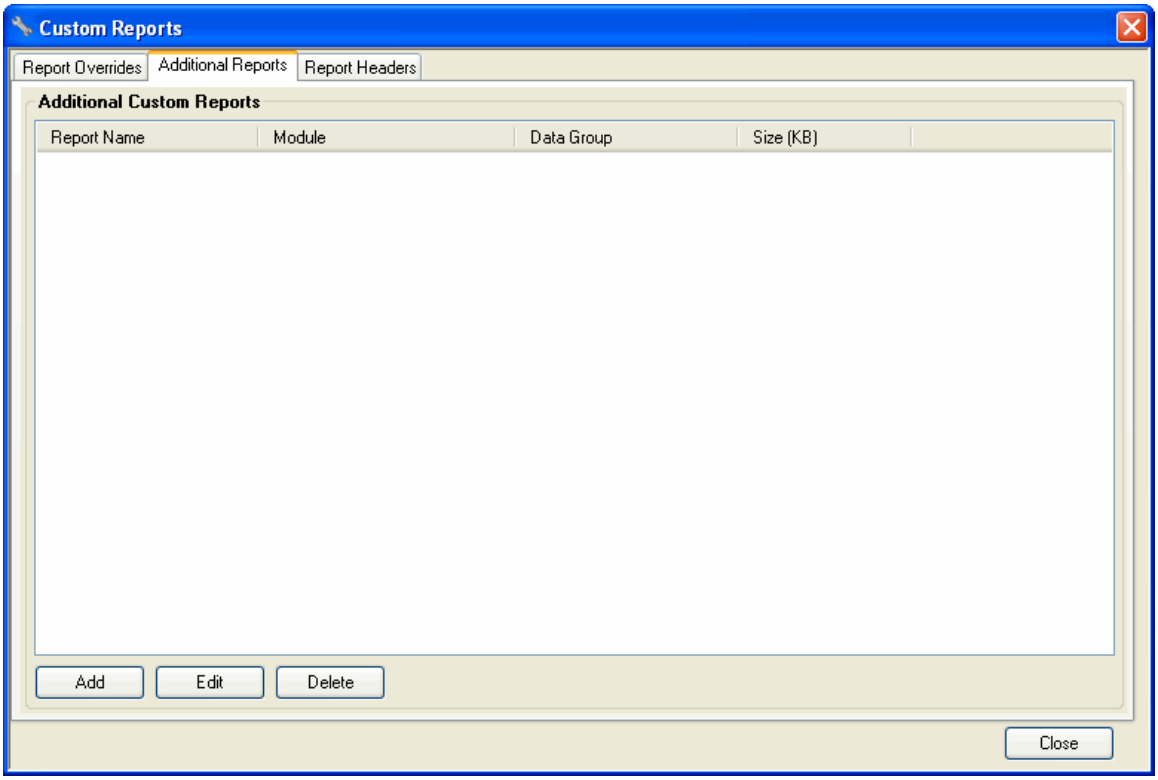
Additional Reports

Adding Reports

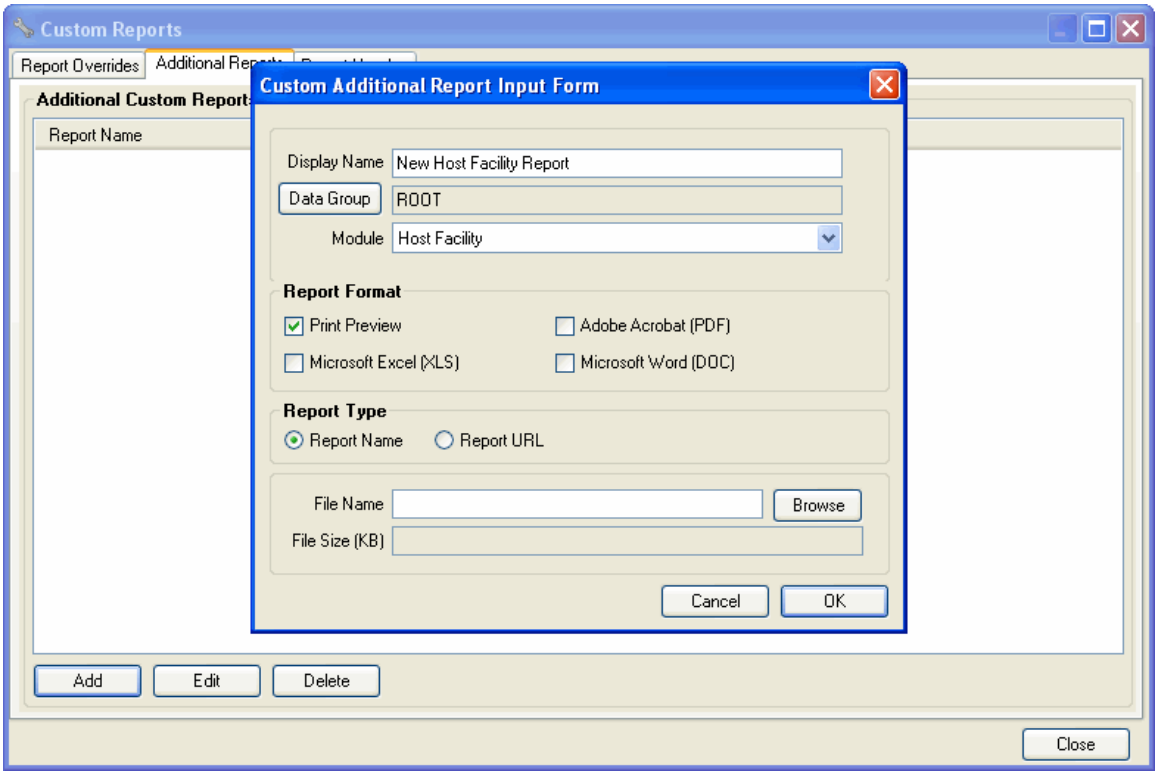
Each module in SIMS includes pre-defined reports that are accessible through the Reports menu. If you want to add a new report, you can create a .rpx file and or revise an existing one using the Custom Reports option in the Reports menu.

Managers have full read/write access to change the data group field for any custom report. Submanagers can only add/modify reports within their data group.

The Custom Report Additional Reports feature allows you to add new reports within a module. The new report will show up as a new menu item in the Reports menu.



Choose the Add button to add a new report.



Custom Reports

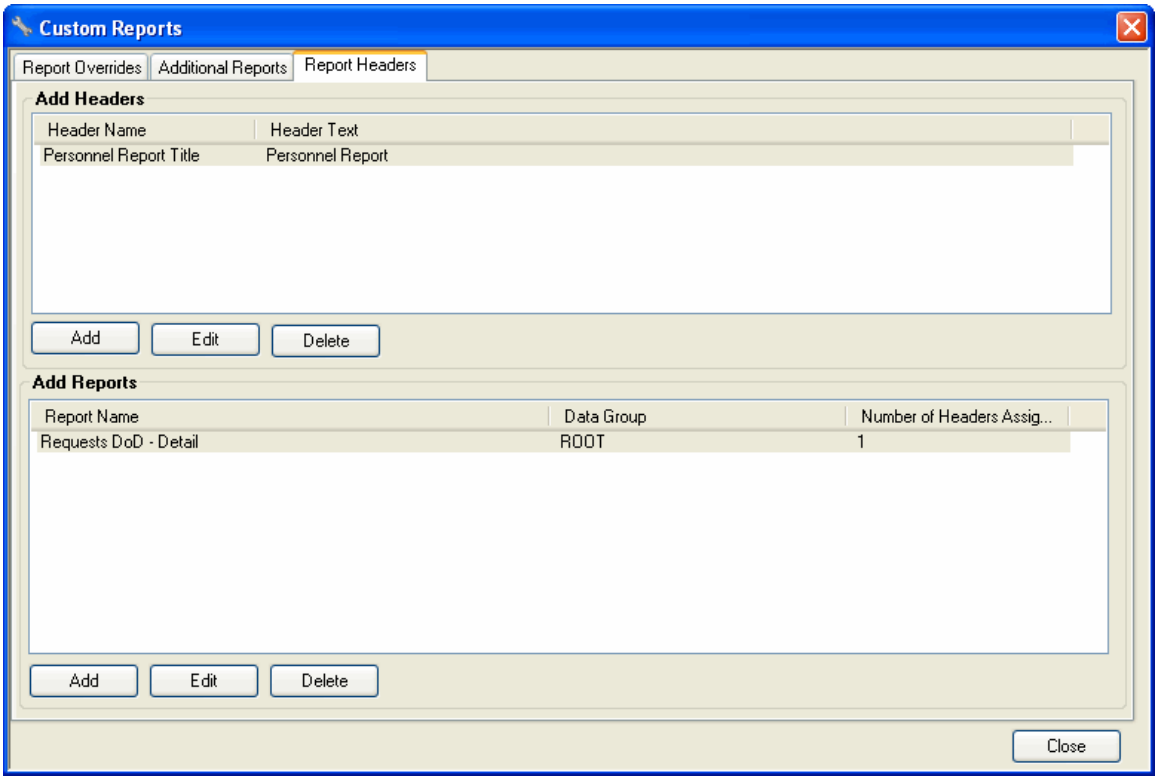
Field Name	Description

Display Name	Enter the name as it will appear in the module's Report menu.
Data Group	You can filter what users will use the revised report by selecting a Data Group. Managers have full read/write access to change the data group field for any report. Submanagers can only add/modify reports within their data group.
Module	Select the module in which you wish to add the new report.
Report Format	Select the report format that will display when executing the report.
Report Type	Select the report type.
File Name	Use the Browse button to select a the .rpx file. The file path will be displayed here. When selecting the .rpx file, choose the main file for the custom report. If your custom report uses any subreports, there is additional set up required to copy the subreports to their correct locations. Only the main report is added and saved in the SIMS database. Typically, the main report file specifies the file paths for any subreports that it uses. The code can either be specified in the Scripts tab or in the Properties tab of the main report. Please contact SIMS Support for assistance on setting up subreports.

After adding a customized report, it will be saved in the database and will automatically be used by every SIMS user in the selected Data Group whenever the report is selected in the Reports menu. For more information on Custom Reports, please see the help documentation for Custom Reports.

Report Headers

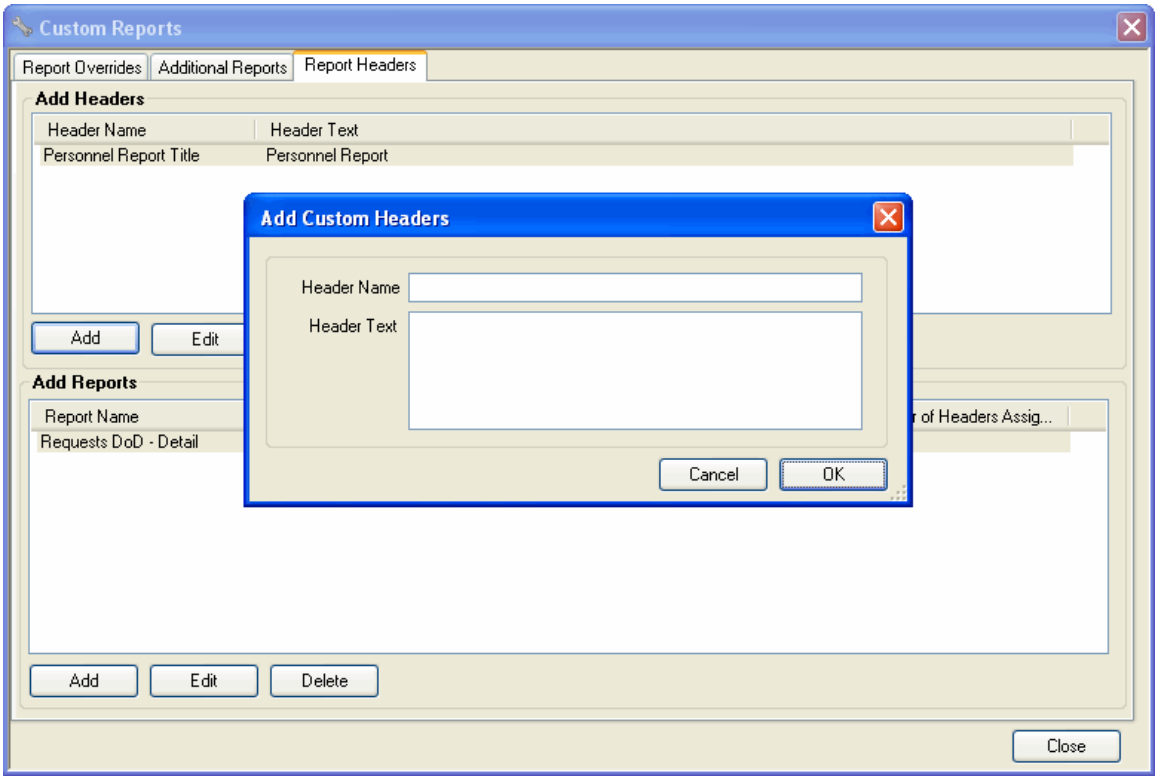
Report Headers
Each module in SIMS includes pre-defined reports that are accessible through the Reports menu. The report header on the built-in reports can be modified using the Custom Report Report Headers utility.



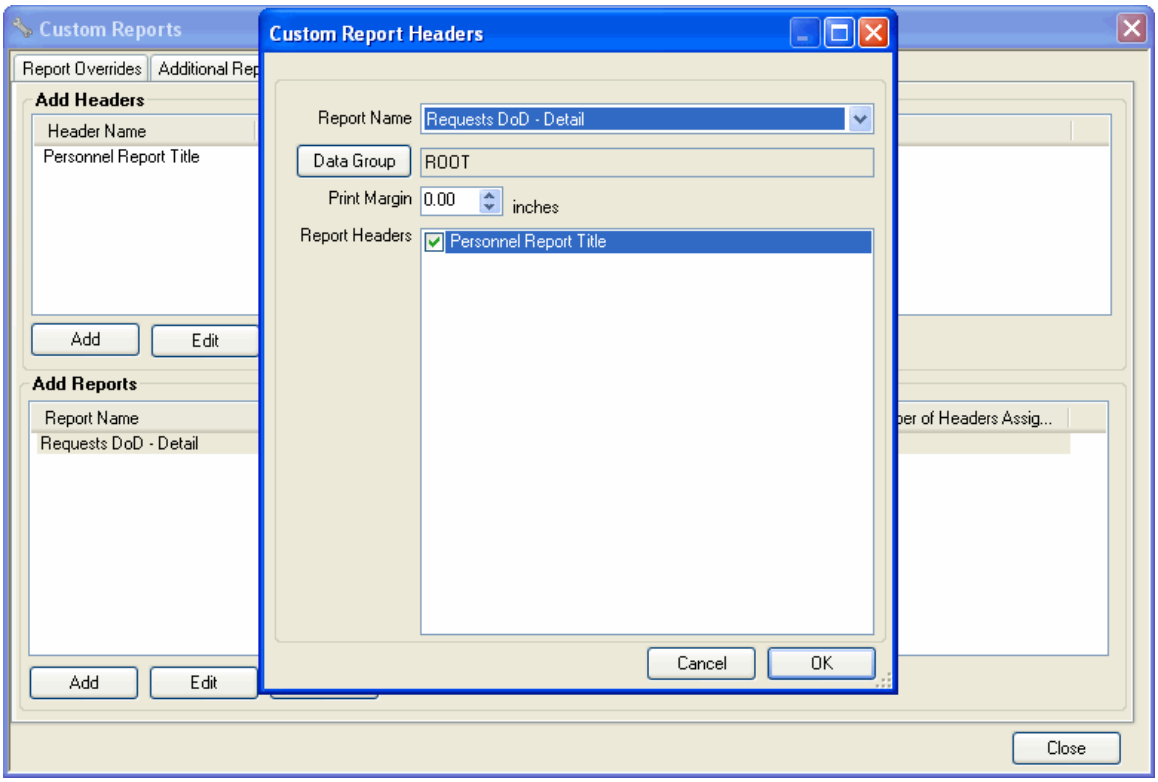
Choose the Add button to add a header to the list.

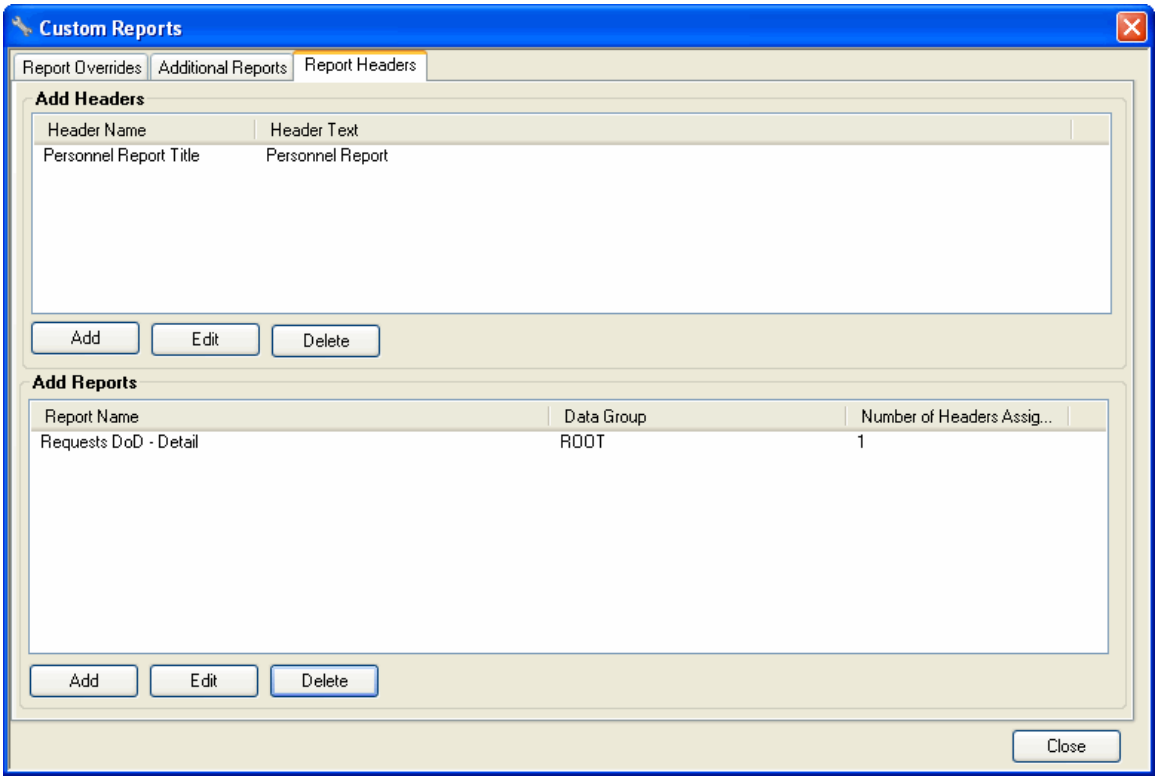
Add Headers

Field Name	Description
Header Name	Edit the name of the header. When you go to the Add Reports section, the report will be selected and matched with the header name.
Header Text	The header text that will appear on the report.



Once different headers are created, choose the Add button to select the report and the header text that will be displayed on the report. Specify the following: report name, data group in which the header will appear on the report, the data group in which the report header will appear, the print margin in the header section of the report and the header that will be used on the report.





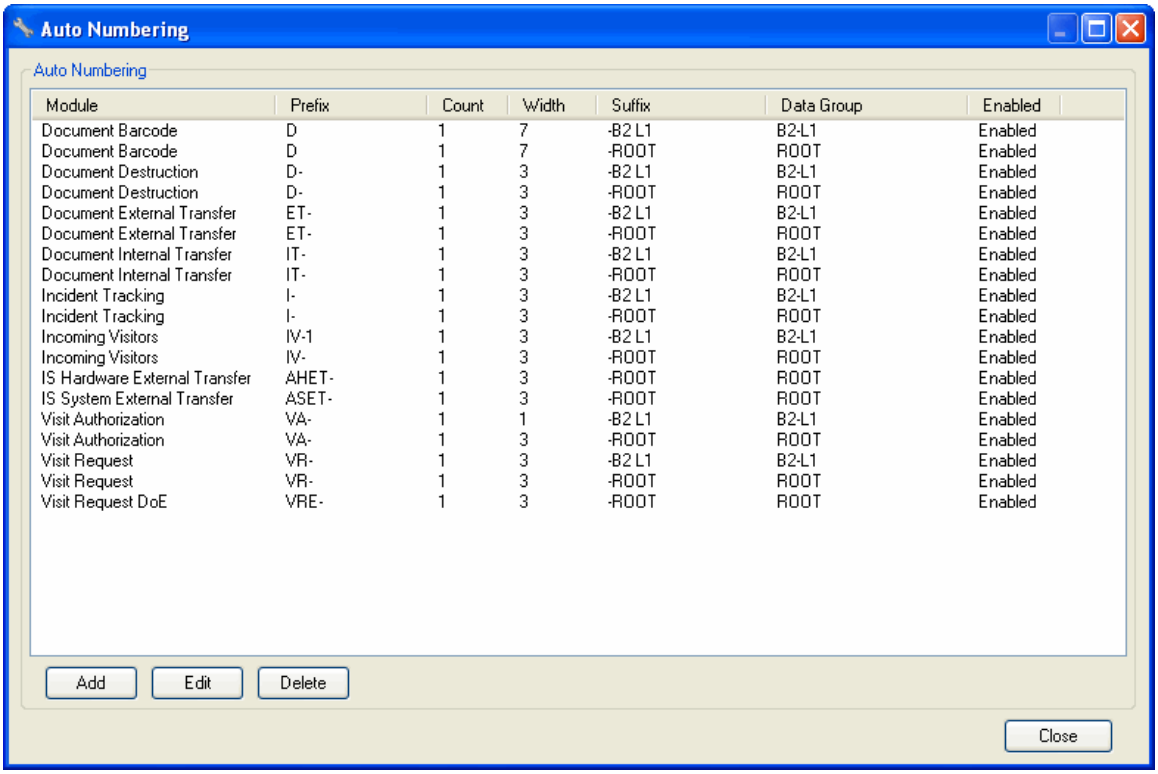
Add Reports

Field Name	Description
Report Name	Enter the name as it will appear in the module's Report menu.
Data Group	The data group in which the report header will appear on the report.
Number of Headers Assigned	Indicates the number of headers assigned to the report.

Auto Numbering

The format for the receipt number and record numbering is defined here. Auto-numbering allows each record or transaction to be assigned a unique number automatically when a record is created or a transaction occurs.

A receipt number is composed of a prefix, a counter, and a suffix, which are concatenated together to make up the receipt number. For example, a prefix of '2006-', a counter of '100' and a suffix of '/A' would have a result of '2006-100/A'. The next receipt would be '2006-101/A', then '2006-102/A', etc.


Auto Numbering
Auto Numbering
Module Prefix Count Width Suffix Data Group Enabled
Document Barcode D 1 7 -B2 L1 B2-L1 Enabled
Document Barcode D 1 7 -ROOT ROOT Enabled
Document Destruction D- 1 3 -B2 L1 B2-L1 Enabled
Document Destruction D- 1 3 -ROOT ROOT Enabled
Document External Transfer ET- 1 3 -B2 L1 B2-L1 Enabled
Document External Transfer ET- 1 3 -ROOT ROOT Enabled
Document Internal Transfer IT- 1 3 -B2 L1 B2-L1 Enabled
Document Internal Transfer IT- 1 3 -ROOT ROOT Enabled
Incident Tracking I- 1 3 -B2 L1 B2-L1 Enabled
Incident Tracking I- 1 3 -ROOT ROOT Enabled
Incoming Visitors IV-1 1 3 -B2 L1 B2-L1 Enabled
Incoming Visitors IV- 1 3 -ROOT ROOT Enabled
IS Hardware External Transfer AHET- 1 3 -ROOT ROOT Enabled
IS System External Transfer ASET- 1 3 -ROOT ROOT Enabled
Visit Authorization VA- 1 1 -B2 L1 B2-L1 Enabled
Visit Authorization VA- 1 3 -ROOT ROOT Enabled
Visit Request VR- 1 3 -B2 L1 B2-L1 Enabled
Visit Request VR- 1 3 -ROOT ROOT Enabled
Visit Request DoE VRE- 1 3 -ROOT ROOT Enabled
Add
Edit
Delete
Close

For more information about using this screen, see Input Screen.

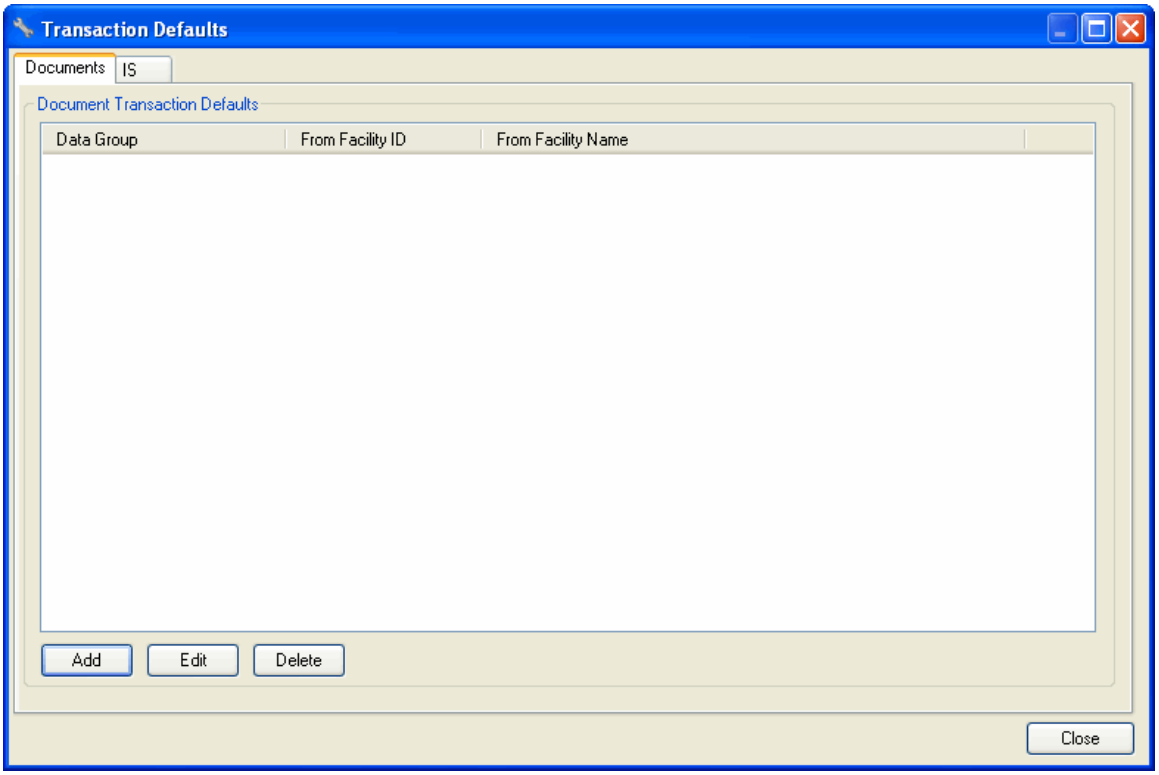
Auto Numbering Page Fields

Field Name	Description
Module	Select the module which will use auto-numbering.
Prefix	Select a prefix. An example is: 2006-
Count	Select the count in which the number will be incremented. A prefix of '2006-', a counter of '100' and a suffix of '/A' would have a result of '2006-100/A'. The next receipt would be '2006-101/A', then '2006-102/A', etc.
Width	Select the width of the numbering. A width of 3 will look like the following: 001, 002, 003...
Suffix	Select the suffix. This will appear at the end of the numbering.

Data Group	Specify the data group that will use the Auto-numbering. Data groups are defined in the User Management Data Groups dialog. Managers have full read/write access to change the Data Group. Sub-managers have access to only add/modify values within their Data Group. If Data Groups are not being used, leave this field empty. The auto-numbering scheme will then be used for all SIMS users.
Enabled	If checked, the auto-numbering will be enabled.
Read Only	If checked, the auto-number, the user will not be able to edit the auto-number. If unchecked, the user will be able to edit the number.

Transaction Defaults

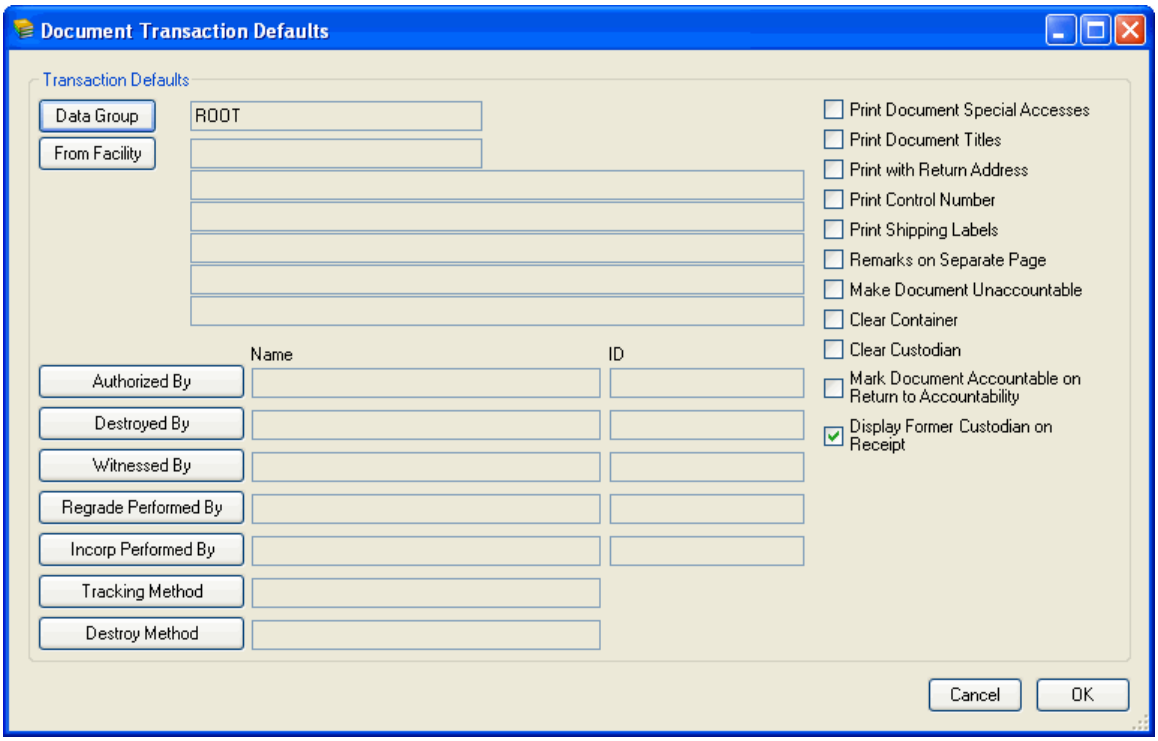
Transaction Defaults allows you to set default values for fields that appear in the Classified Document and IS transaction dialogs. A SIMS Manager has access to add/edit/delete Document and IS Transaction Defaults. A Submanager has access only to add/edit/delete Document and IS transaction defaults within their Data Group. Transaction defaults outside the Submanager's Data Group can only be viewed.



For more information about using this screen, see Input Screen.

Transaction Defaults Page Fields

Field Name	Description
Data Group	The data group assigned to the document transaction default.
From Facility ID	The default From Facility ID.
From Facility Name	The default From Facility Name



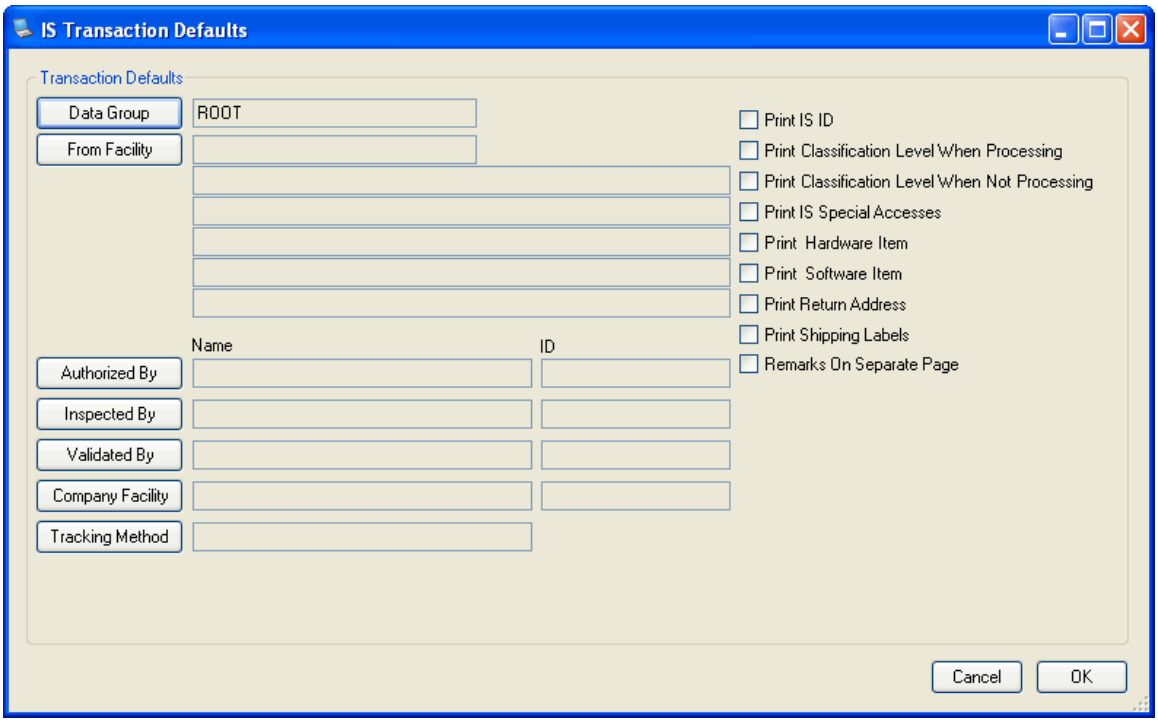
For more information about using this screen, see Input Screen.

Transaction Defaults, Documents Sub-Page Fields

Field Name	Description
Data Group	The data group assigned to the document transaction default.
From Facility	To select the default From Facility default for the document transaction, select the From Facility button and then select a facility in the pick list.

Authorized By	Set a default person for the Authorized By field for an external transfer. Only personnel that are authorized to transfer documents can be selected.
Destroyed by	Set a default person for the Destroyed By field for a destruction certificate.
Witnessed By	Set a default person for the Witnessed By field for a destruction certificate.
Regrade Performed by	Set a default person performing the regrading.
Incorp Performed By	Set a default person performing the incorporation.
Tracking Method	Set a default method to be used for document transfer (e.g., Registered Mail, Hand-Carry, etc.).
Destroy Method	Set a default method of destruction such as burn, shred, etc.
Print Document Special Accesses	If selected, the default will be set so that the document's special accesses will appear on the external transaction report.
Print Document Titles	If selected, the default will be set so that the document titles will appear on the external transfer certificate.
Print With Return Address	If selected, the default will be set so that the return address will appear on the external transfer certificate.
Print Control Number	If selected, the default will be set so that the control number will appear on the external transfer certificate
Print Shipping Labels	If selected, the default will be set so that labels will print on a separate page at the end of the external transfer certificate.
Remarks on Separate Page	If selected, the default will be set so that remarks will print on a separate page at the end of the external transfer certificate.
Make Document Unaccountable	If checked, the default will be set so that the document unaccountable field will get checked.
Clear Container	If checked, the default will be set so that the container field will get cleared for the documents to be destroyed.
Clear Custodian	If checked, the default will be set so that the custodian field will get cleared for the documents to be destroyed.

Mark Document Accountable on Return to Accountability	If checked, the default will be set such that the document is marked as accountable when performing the return to accountability transaction.
Display Former Custodian on Receipt	If checked, the default will be set such that the former custodian is printed on the internal transfer report.



For more information about using this screen, see Input Screen.

Transaction Defaults, IS Sub-Page Fields

Field Name	Description
Data Group	The data group assigned to the document transaction default.
From Facility	To select the default From Facility default for the document transaction, select the From Facility button and then select a facility in the pick list.
Authorized By	Set a default person for the Authorized By field for an IS external transfer. Only personnel that are authorized to transfer can be selected.

Inspected By	Set the default inspected by person for an IS transaction.
Validated By	Set the default validated by person for an IS transaction.
Company Facility	Set the default company facility for an IS transaction.
Tracking Method	If checked, the default will be set so that the tracking method will print on the IS external transfer report.
Print IS ID	If checked, the default will be set so that the Print IS ID field will get checked for the IS external transfer.
Print Classification Level When Processing	If checked, the default will be set so that the Print Classification Level When Processing field will get checked for the IS external transfer.
Print Classification Level When Not Processing	If checked, the default will be set so that the Print Classification Level When Not Processing field will get checked for the IS external transfer.
Print IS Special Accesses	If checked, the default will be set so that the print IS Special Access will get checked for the IS external transfer.
Print Hardware Item	If checked, the default will be set so that the Print Hardware Item field will get checked for the IS external transfer.
Print Software Item	If checked, the default will be set so that the Print Software Item field will get checked for the IS external transfer.
Print Return Address	If checked, the default will be set so that the print return address field will get checked for the IS external transfer.
Print Shipping Labels	If checked, the default will be set so that the print shipping label field will get checked for the IS external transfer.
Remarks on Separate Page	If checked, the default will be set so that transaction remarks will print on a separate page.

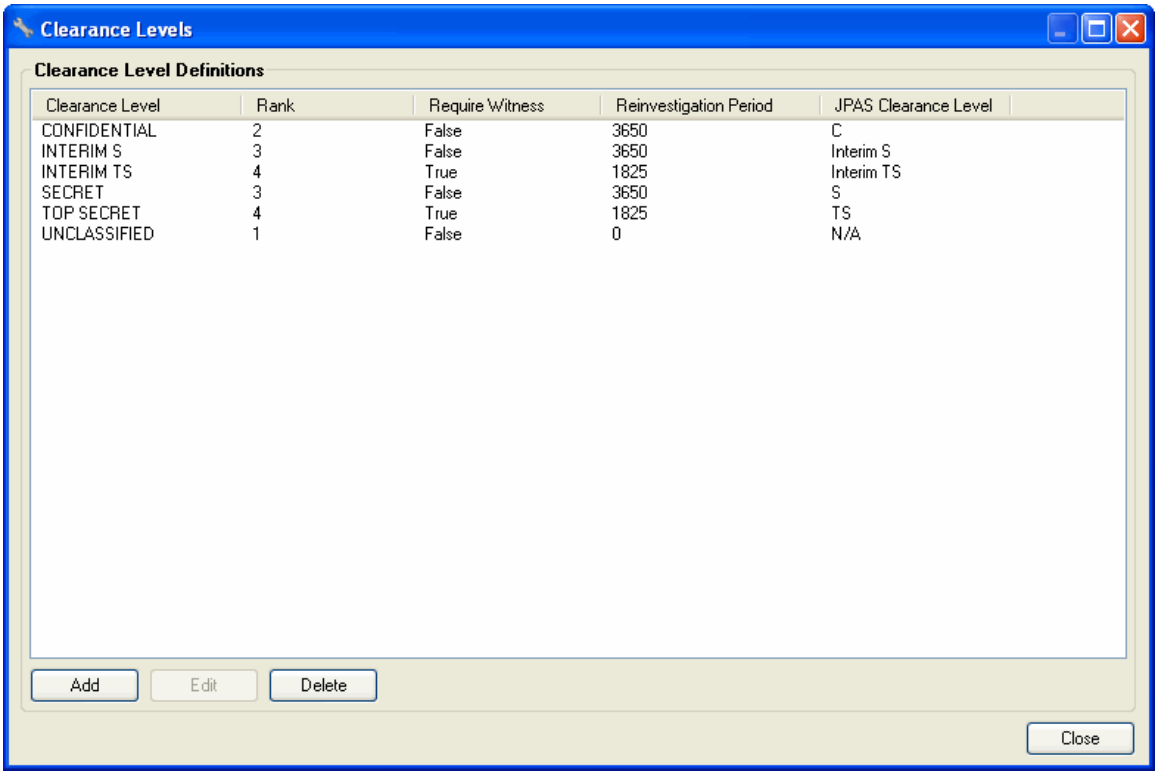
Related Topics

Document Transactions

IS Transactions

Clearance Levels

Clearance Level Definitions allows you to add and/or modify clearance levels in order to tailor SIMS to a specific application. The four standard DoD classification level defaults are: Top Secret, Secret, Confidential, and Unclassified.

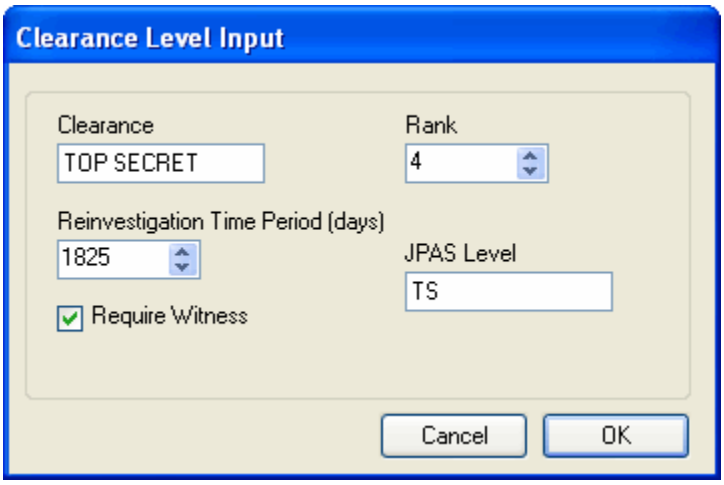


For more information about using this screen, see Input Screen.

Clearance Level Definitions Page Fields

Field Name	Description
Clearance Level	The clearance level.
Clearance Rank	Each clearance level is assigned a rank order so that SIMS is able to determine whether one clearance is higher than another. A rank of 4 would be higher than a rank of 1. Ranks are used by online error checking to verify that a person's clearance is high enough for a document, container, etc. More than one clearance can have the same rank number if they should be treated as the same (i.e. Interim Secret and Secret).
Require Witness	Indicates whether a witness is required to perform a Document Destruction transaction on documents at this classification level.

Reinvestigation Period	The number of days from the time a clearance has been investigated until the next investigation is required.
JPAS Clearance Level	The JPAS clearance level.



If you want to Import JPAS data using a .csv file generated by JPAS, you need to assign the JPAS Access that corresponds to your SIMS Clearance Level.
Refer to the topic on Cleared Personnel Transactions for more information on JPAS import.

Check Require Witness if a document is destroyed at this classification level and needs to have a witness.

The Reinvestigation Time Period is the number of days from the time a clearance has been investigated until the next investigation is required. For example, Top Secret is 5 years or 1825 days. You can set the time period required for each clearance you define.

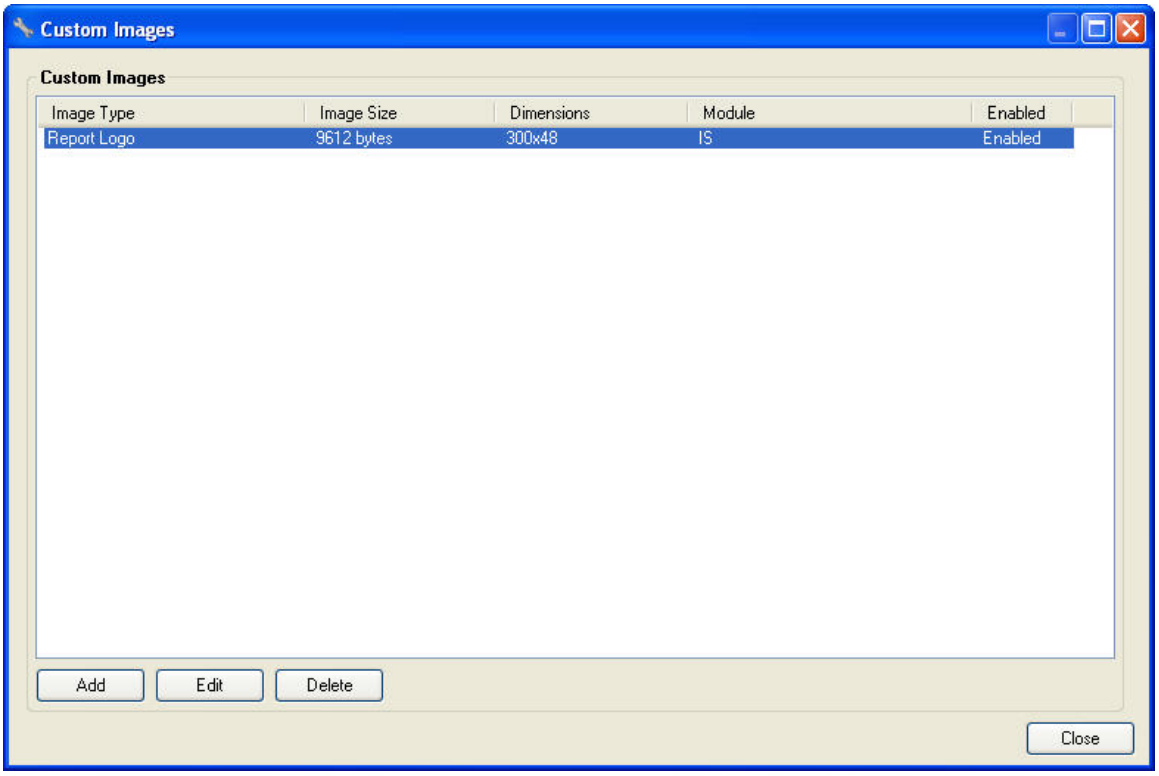
See also System Customization > Time Periods Tab > Notification Lead Time for Overdue Personnel Reinvestigation. The value in Utilities, System Customization -> Time Periods tab -> Personnel section -> 'Notification Lead Time for Overdue Personnel Reinvestigation' (henceforth 'Lead Time') is compared to the Utilities -> Clearance Levels -> 'Reinvestigation Period', for the selected Clearance Level in the person's Clearance Case. If the 'Reinvestigation Period' is greater than the 'Lead Time'', the 'Reinvestigation Date' should be changed to be equal to the 'Investigation Date', plus the 'Reinvestigation Period', minus the 'Lead Time'. If the 'Reinvestigation Period' is less than or equal to the 'Lead Time'', the 'Reinvestigation Date' will not change.

Custom Images

The image that appears on the upper right side of the login screen can be modified using the Custom Images Utility.

SIMS can also allow users to modify reports in a module with a custom logo using the Custom Images and Custom Reports utilities. The Custom Reports guide provides an example of how to add a logo onto the DoD visit request report. That example will show how to add a logo that will always display on a report when it is executed. If there is

a need to enable/disable a logo within each module, the Custom Images utility can work in conjunction with the Custom Reports Override utility to allow users to turn on/off the logo when executing a report.



For more information about using this screen, see Input Screen.

Custom Images Page Fields

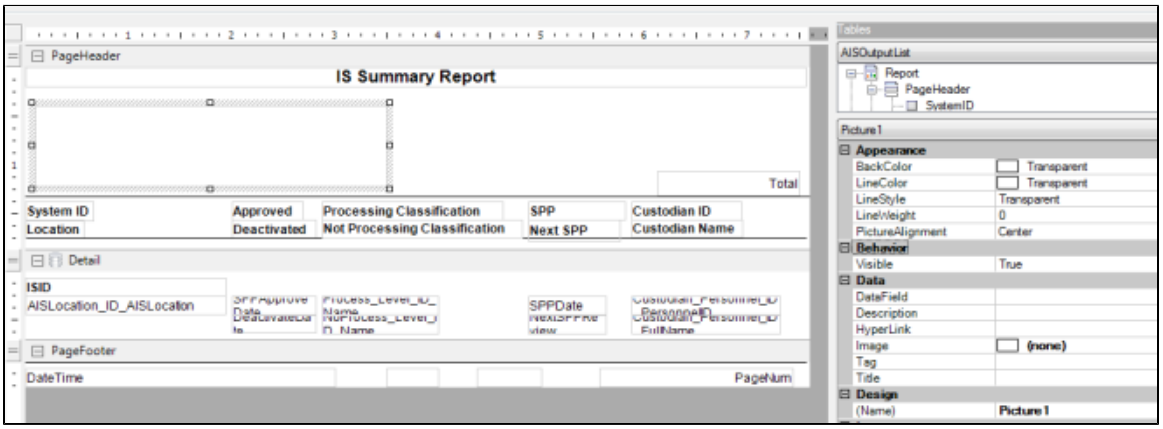
Field Name	Description
Image Type	When selecting Login as the image type, the image that appears on the upper right side of the login screen can be assigned. When selecting Report Logo as the image type, a logo can be enabled/disabled for reports for each module. See the example below on how to edit a report using a report logo.
Image Size	The size of the image.
Dimensions	The dimensions of the image.
Module	The SIMS module assigned to the image when the image type is a Report Logo.
Enabled	If checked, the custom image will be enabled. The image will appear on the SIMS login screen if the image type is Login. An image will appear on a custom report if the image type is Report Logo.

Here are steps with an example demonstrating how to display a custom logo image on the IS Summary Report.

Similar steps are required for any report that needs to display a custom logo.

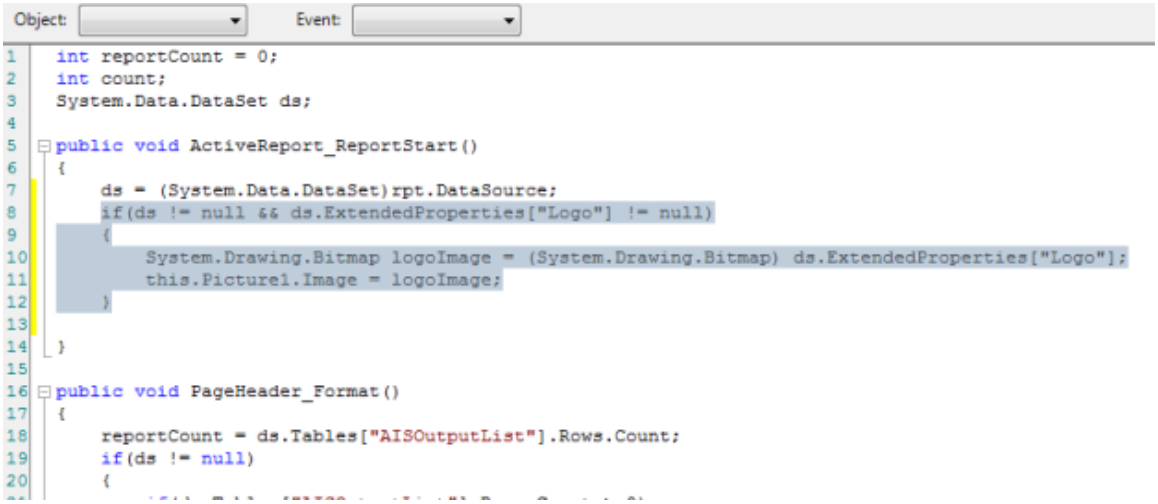
- Go to Utilities > Custom Image Utility.
- Click Add and browse. Select the desired logo image.
- Select Image Type as Report Logo.
- Check the Enabled check box.
- Select the IS module from the drop-down and click Save.

- Click Cancel and Close to return to the modules main screen.
- Open the IS module, select any record and select Design Custom Report from the Reports Menu.
- Open the IS Summary report (AISSummary.rpx).
- Drop a picture box in the header section of the report. Make sure the control name is Picture1.



- Switch to the Scripts view and paste the following code in ActiveReport_ReportStart()

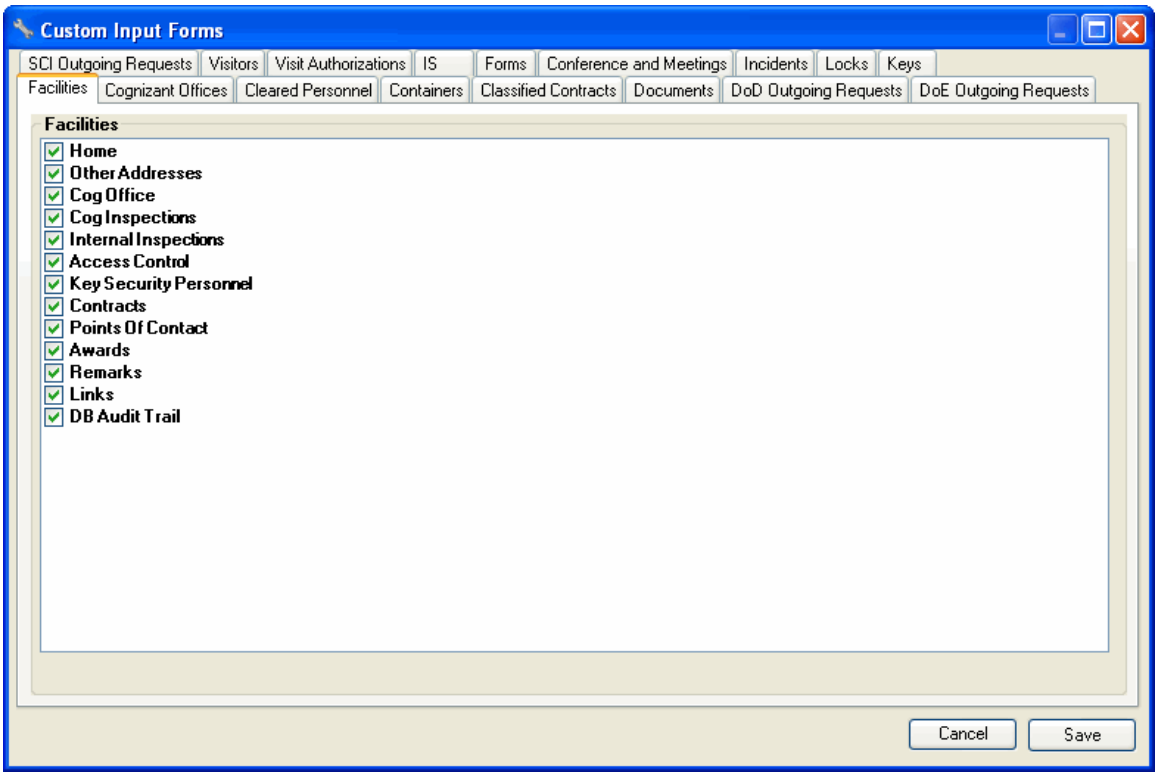
```
if(ds != null && ds.ExtendedProperties["Logo"]!= null)
{
System.Drawing.Bitmap logoImage =
(System.Drawing.Bitmap) ds.ExtendedProperties["Logo"];
this.Picture1.Image = logoImage;
}
```



- Save this report file to a convenient location such as Desktop or My Documents.
- Go to Utilities >Custom Reports and override the IS Summary Report using this report file.
- Go to the IS module and run the summary report. The logo should be displayed in the picture box.

Custom Input Forms

Custom Input Forms allows the option to display or hide tabs in each of the SIMS modules.



For more information about using this screen, see Input Screen.
Custom Input Forms Page Fields

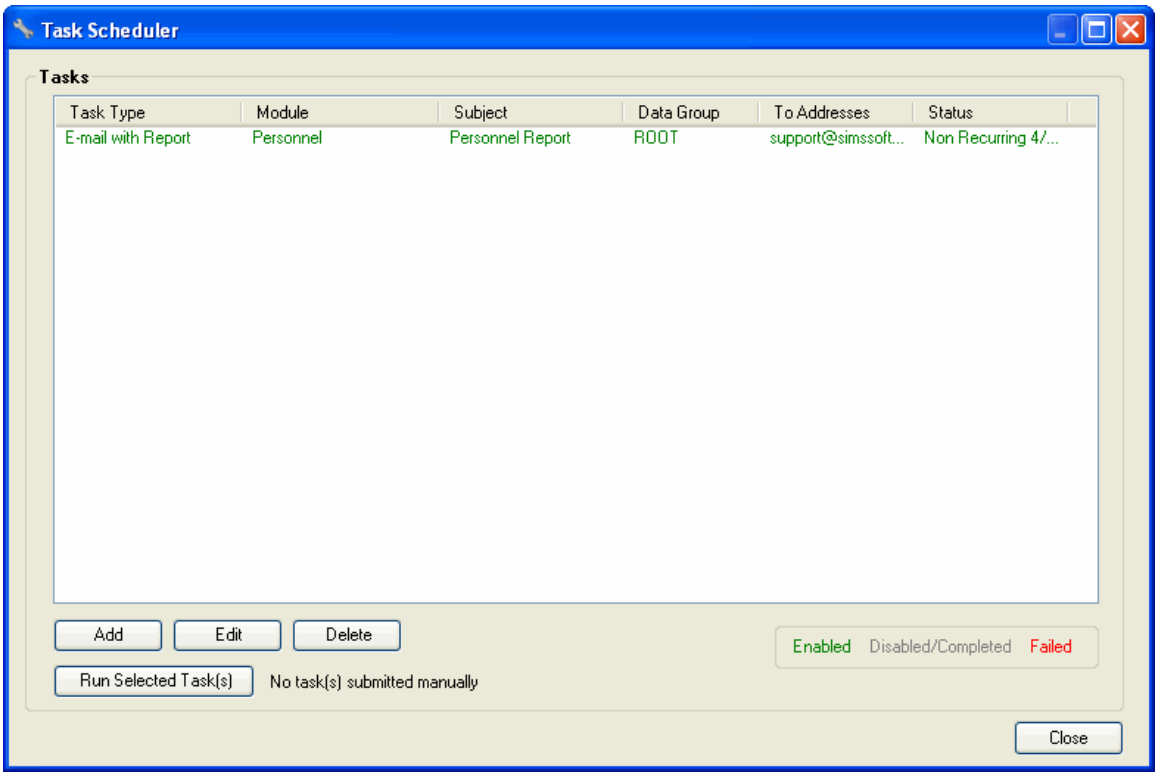
Field Name	Description
Field Name	If left checked, the tab will be visible in the SIMS module. If the check box is unchecked, the module tab will be hidden.

Task Scheduler

Once you have the required SIMS version installed along with SQL Server 2005 or 2008, you will need to obtain the SIMS Workflow Service installation file. This installation must be at the same version as the SIMS Standalone or Client and Server installations and is required for the SIMS Task Scheduler Utility. See the section on SIMS Workflow Service.

Before using the Task Scheduler, go to Utilities / System Customization. Ensure the three values under 'e-mail' are

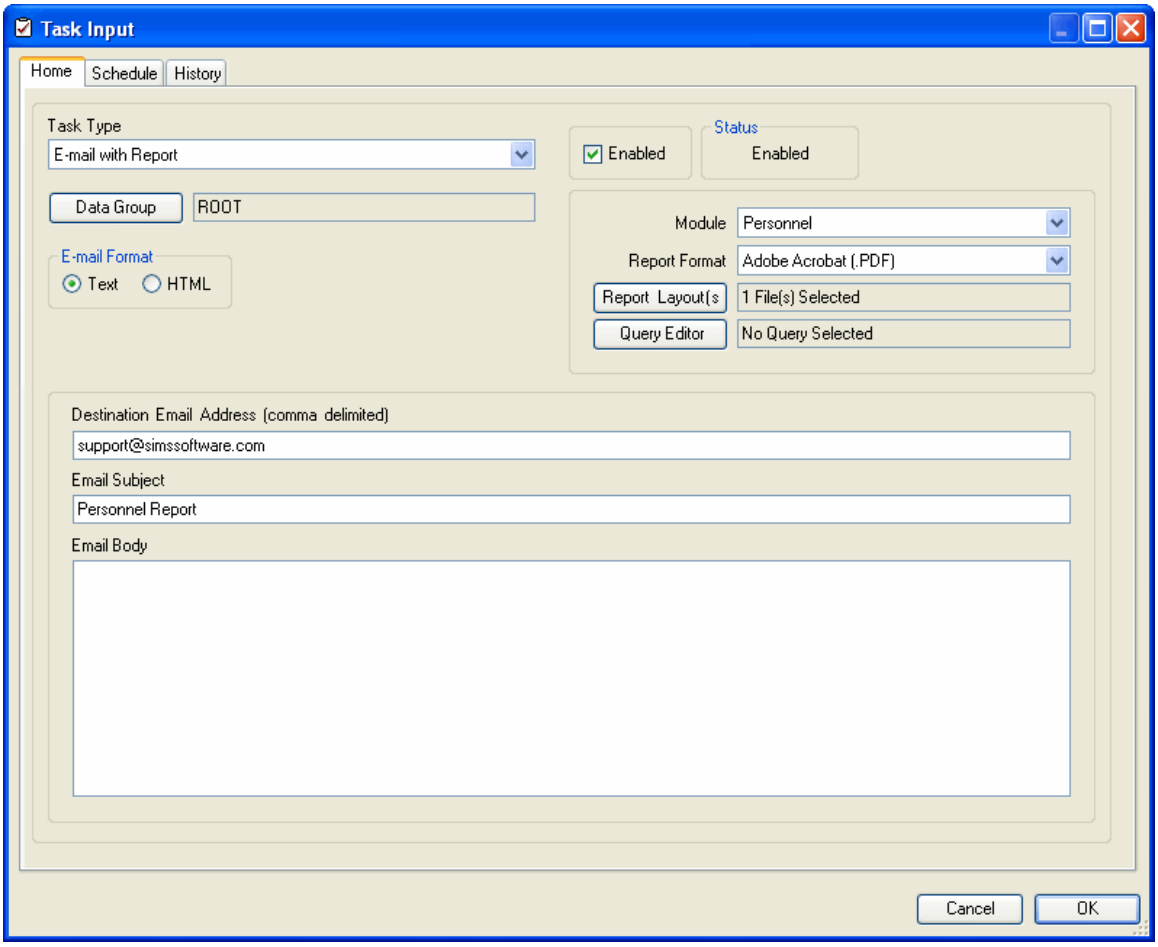
populated on the System tab: SMTP Server, E-mail account, E-mail password. If there is a case where the e-mail account does not use a password, you will need SIMS version 7.5.35 or newer. It will allow you to leave the E-mail password field blank in System Customization. Earlier SIMS versions require an E-mail password to be set in order to use the Task Scheduler. In System Customization, also check the options 'SMTP server requires SSL secured connection' and/or 'Outgoing SMTP server requires authentication' if they are being used. This information should be available with the system administrator or Internet Sevice Provider (ISP).



For more information about using this screen, see Input Screen.

Task Scheduler Page Fields

Field Name	Description
Run Selected Task	Select a task record and then this button to immediately execute the selected task.
SIMS Service Status	Indicates whether or not the SIMS Service is running. The SIMS Workflow Service must be installed. To ensure that the SIMS Workflow Service is running, go to **Services** in the **Windows Control Panel**. and verify that the SIMS Workflow Service is started.



For more information about using this screen, see Input Screen.

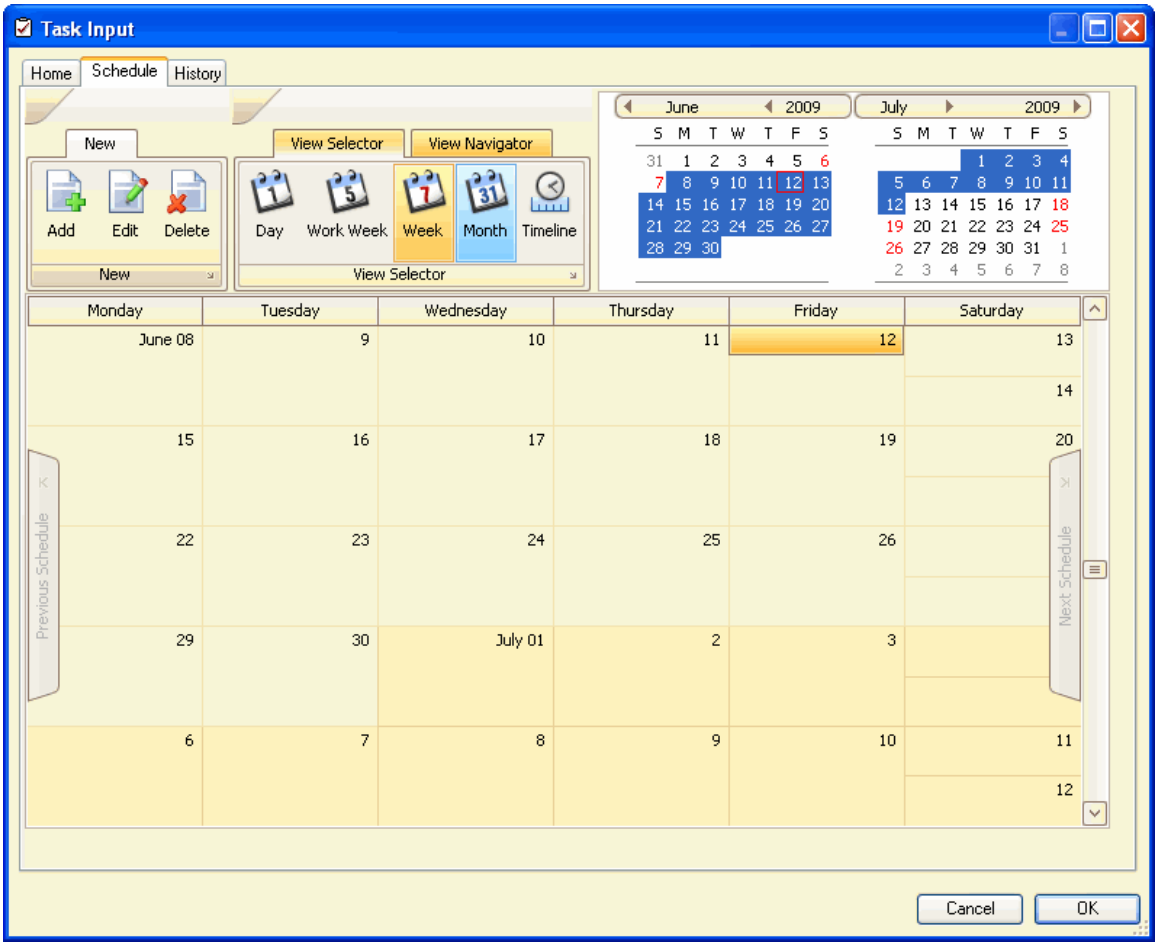
Task Input Page Fields

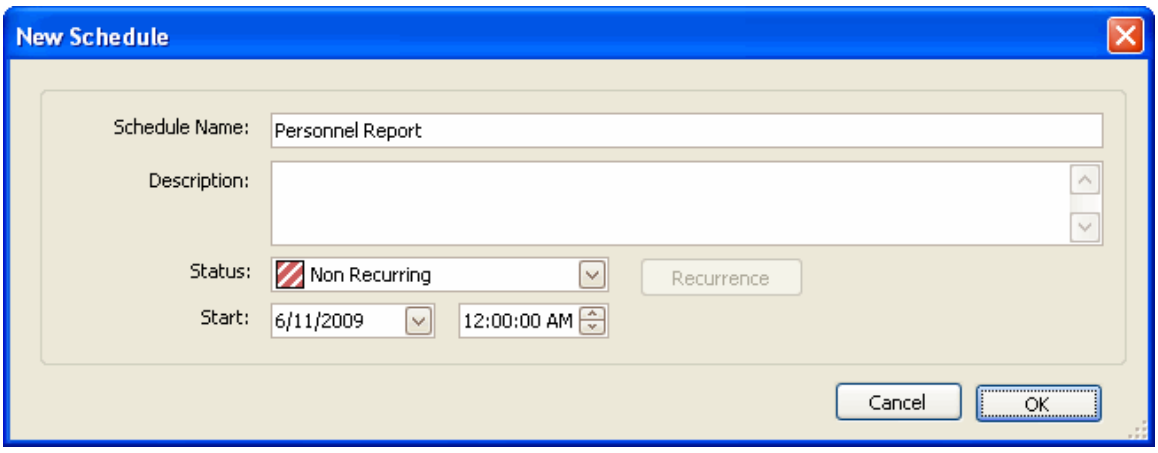
Field Name	Description
Task Type	Select a task type from the list.
Module	Choose the module the task is being created for.
Enabled	Check this box to enable the task.
Report Format	Choose the report format.

Report layout	Browse for the SIMS .rpx report file. Note: When a report that sorts based upon the current output list sort (e.g., summary, detail, and many other reports) is run through the Task Scheduler utility, the report will sort by the first column in the customize output list columns settings for either (a) the user who defined the task; or (b) the default values set up by SIMS if there are no entries for the user who set up the task. If a custom version of either the Document Count by Keyword or Document Count by Special Access through the Task Scheduler utility, you must keep the main portion of the original SIMS file name (e.g., DocumentsKeywordCount) as part of their custom file name (e.g., DocumentsKeywordCount_v1.0).
Query Editor	Provide a query for the report using the Query Editor.
Data Group	Choose the Data Group for the task. If you specify a Data Group for the task, you will get (1) the records in that data group; (2) the records in any data groups under that data group in the hierarchy; and (3) any records that are not assigned to a data group. If records for the specified data group and **only** that data group are desired, then create a query using the **Query Editor** button. In the Query Editor dialog, expand the main table for the module (e.g., Personnel in the Personnel Module) and scroll down until 'UserGroup_ID' appears. Expand that and then the UserGroups table appears. Expand that so the Group Name field appears and then select that. Enter the data group name in the Value field and then press the 'Add to Query' button. Finally, press the OK button.
E-mail format	Choose either text or HTML as the format.
Destination E-mail Address	Specify the e-mail addresses where the e-mail will be sent. Use a comma for multiple e-mail addresses.
Email Subject	Specify a subject for the e-mail.

Email Body	Specify the body text for the e-mail.

Switch to the Schedule tab to add, edit, or delete a schedule for the task.

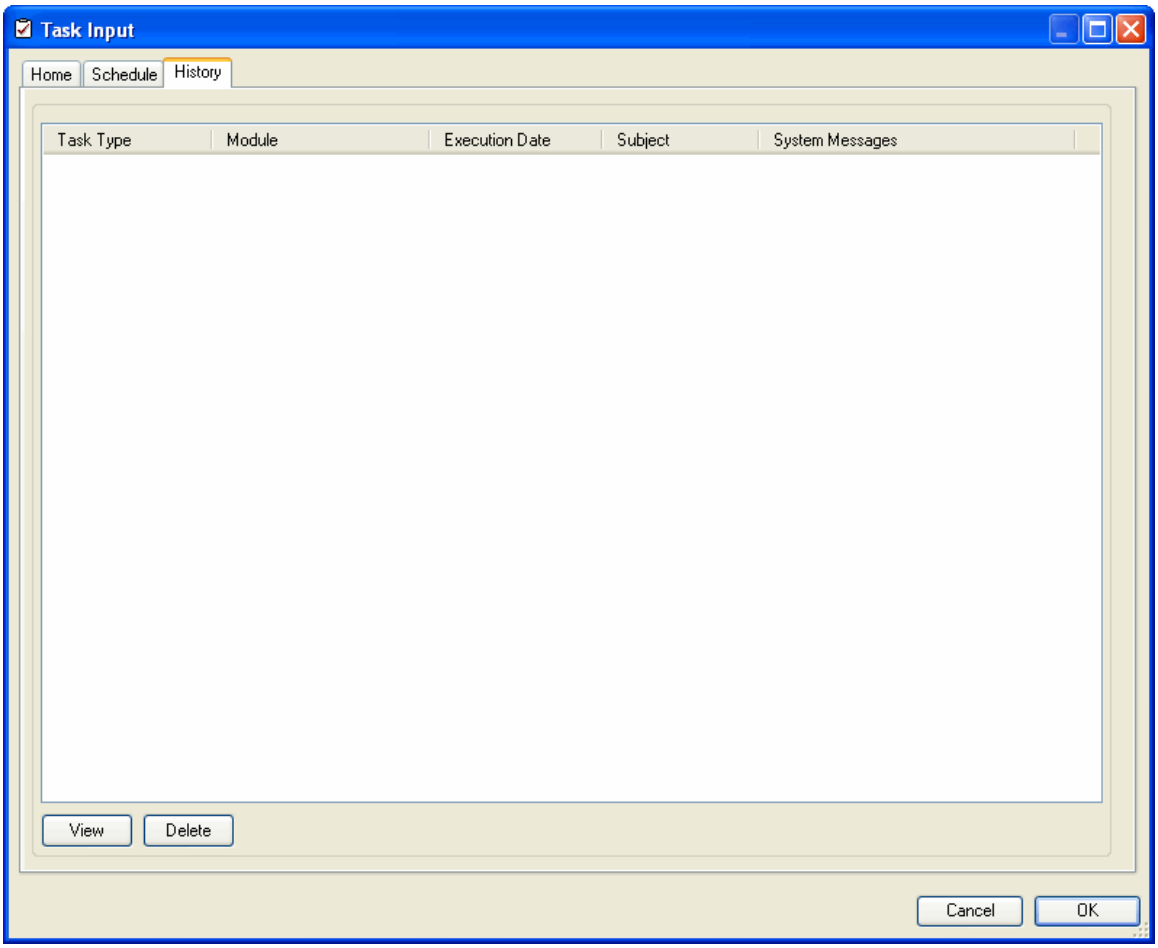




New Schedule Page Fields

Field Name	Description

Schedule Name	Specify a name for the schedule.
Description	Specify a description (i.e. how often the script will execute).
Status	Specify whether the task will be non-recurring or recurring. If the task is non-recurring, edit the start date and the start time. If the task is recurring, choose the Recurrence button. Choose an option to have the task recur daily, weekly, monthly, yearly, etc. Specify the start date and start time.
Start	Edit the start date and start time for the task.



History Page Fields

Field Name	Description

View/Delete	View the module, execution date, subject and system messages that have occurred. Select a history item and then delete to remove the entry from the list.

Web Access

SIMS clients with web browser privileges may use their standard web browser software (Microsoft Internet Explorer 5.0 and later recommended).

Note that to access a SIMS database via a web browser located on the very same PC, an internet address of 127.0.0.1 (self IP) should be used.

To set up Module Access, you must be an administrator. For more information, see the topic User Management Users.

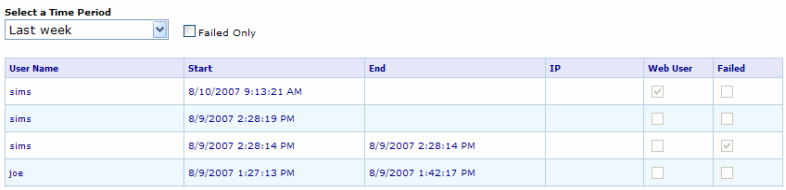
Session Log

To view the session log, connect to a server using IE and go to the following URL:

http://127.0.0.1/SimsWeb/ASP/SessionLog.aspx

Replace the local host IP 127.0.0.1 with the IP address of the server you are connected to if it is other than your own PC. You will get a login screen.
You must be a SIMS Administrator to connect.

Note the Drop down for viewing various date ranges. Select a time period or select the last option to enter a manual date range.
Choose the "Failed Only" check box to filter the list so that it displays only failed login attempts.



If you choose to manually enter a date range, a new page allowing you to enter the date range will appear.

Select the Down arrow to display a calendar or choose the question mark which will give other date options. You must select a From and To Date.

Click on the "Failed Only" check box if you wish to filter failed login attempts between the date range. Otherwise leave this unchecked to filter all ("failed" and "successful") logins between your date range.

Choose the Search button to complete the date range filtering.



Currently Connected Users
To view currently connected users, connect to a server using IE and go to the following URL: http://127.0.0.1/SimsWeb/ASP/SIMSClientUsers.aspx

Replace the local host IP 127.0.0.1 with the IP address of the server you are connected to if it is other than your own PC. You will get a login screen. You must be a SIMS Administrator to connect.

Web Access Bypass

If your primary requirement is just to save the users from logging in, you can use the data group bypass URL feature.

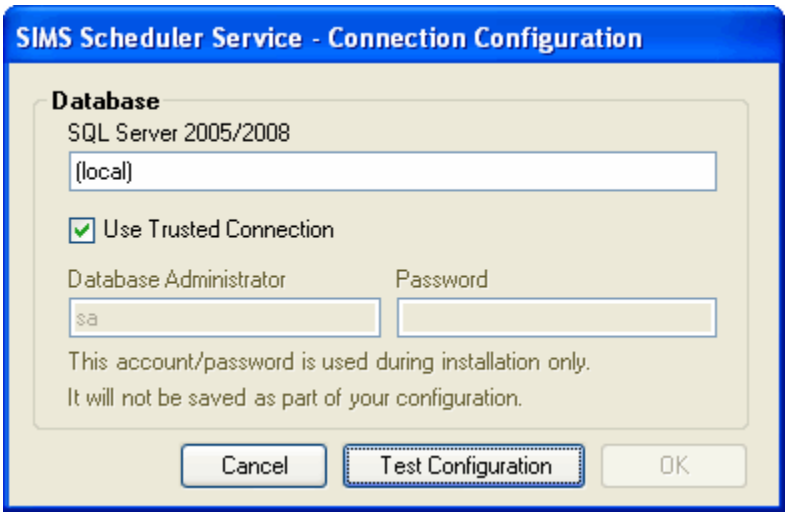
Instructions to setup your Web Bypass for any SIMS Web page:
1) Create a SIMS account where username and password are the same.
2) Grant the account only access to the web's outgoing request module.
3) Assign it to a data group with the same name as the user account.
4) Then add this to the end of the URL that accesses the page: **?DG=account** (sample: http://localhost/SimsWeb/ASP/Login.aspx?DG=account)
5) For the Page link above (replace the **localhost** with the FQDN or IP address of your webserver).

SIMS Workflow Service

Once you have the required SIMS version installed along with SQL Server 2005 or 2008, you will need to obtain the SIMS Workflow Service installation file. This installation must be at the same version as the SIMS Standalone or Client and Server installations and is required for the SIMS Task Scheduler Utility.

Install SIMS Workflow Service

Double click on the SIMS Workflow Service installation file. Files will be copied and a dialog will appear.



Specify the SQL Server instance, user name, and password. Choose the Test Configuration button. If the test is successful, choose the OK button to complete the installation.

Moving a SIMS Standalone Database to a New PC

The following steps will guide you through the process of moving SIMS Standalone data files to a new machine. This guide assumes SIMS and SQL Server 2005 Express Edition or SQL Sever 2008 have been installed into the default locations. Both SIMS databases will need to be at the same SIMS Standalone version to complete this database

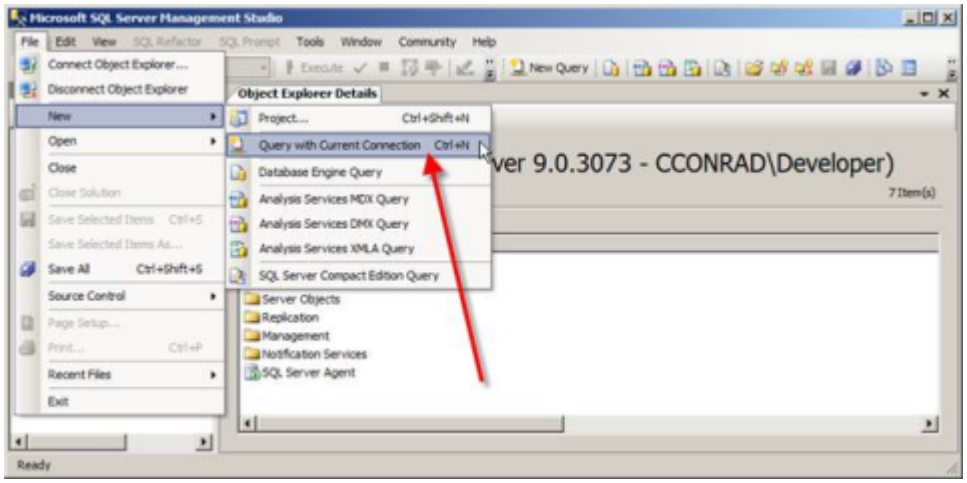
move.

Part 1 – Install SIMS

The first step is to install SIMS Standalone on the target PC. Please refer to the *SIMS Installation Guide* for step by step instructions on installing SIMS. Confirm you can login before proceeding.

Part 2 – Locate Source Data Files

1. Open SQL Server Management Studio on your current SIMS PC.
2. Click Connect on the initial connection dialog.
3. Select File / New / Query with Current Connection.

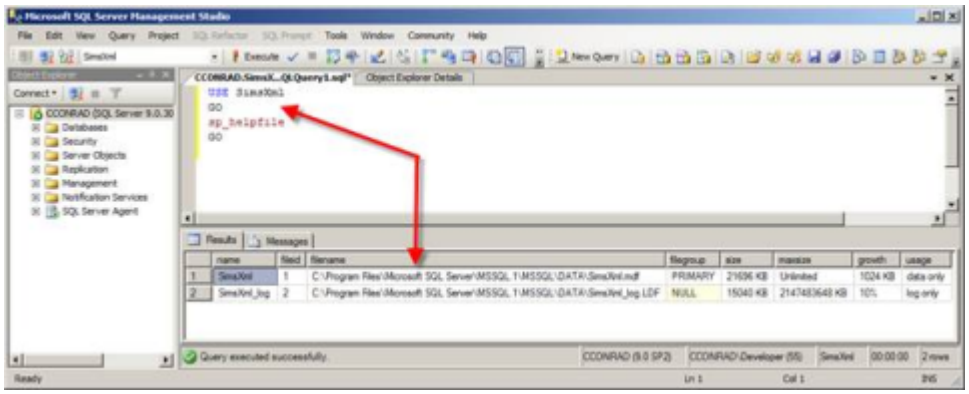


4. Enter the following and press F5:

```
USE SimsXml
GO
sp_helpfile

GO
```

5. Check the *filename* column in the Result window to identify all the files that make up your SIMS database (there are usually two):

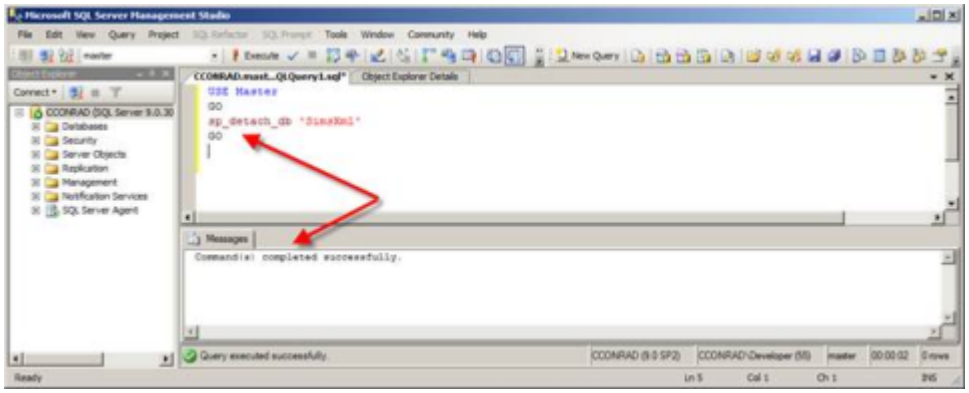


Part 3 – Detach existing database on source PC

6. Replace the current query text with the following and press F5 to detach your database. Note that this will take your current SIMS database offline.

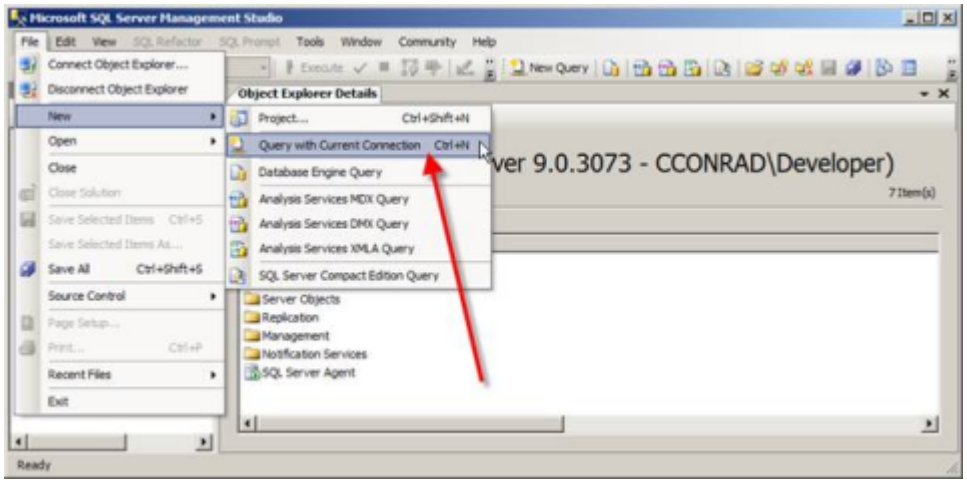
```
USE Master
GO
sp_detach_db 'SimsXml'
GO
```

7. Confirm the Messages window indicates *Command(s) completed successfully*.



Part 4 – Detach new, empty database on target PC

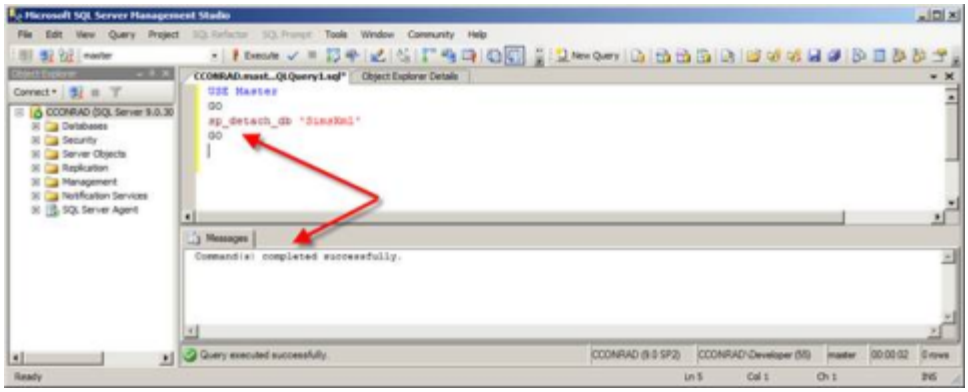
8. Open SQL Server Management Studio on your target PC.
9. Click Connect on the initial connection dialog.
10. Select File / New / Query with Current Connection.



11. Execute the following statement to detach your new, empty database.

```
USE Master
GO
sp_detach_db 'SimsXml'
GO
```

12. Confirm the Messages window indicates *Command(s) completed successfully*.



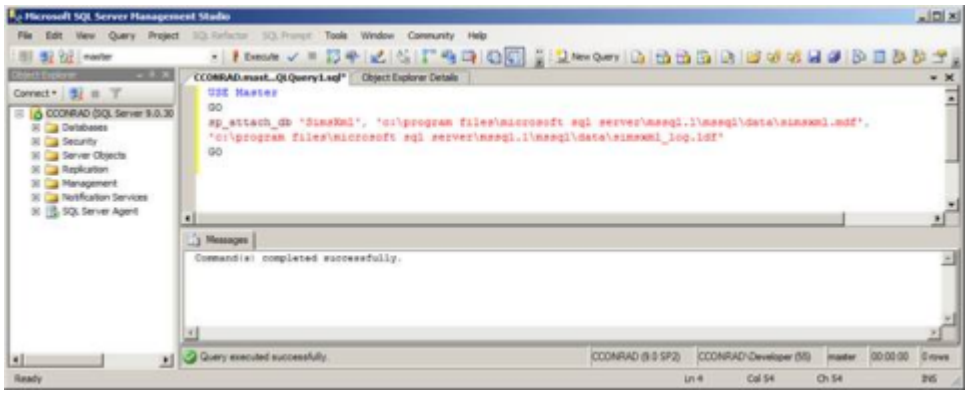
Part 5 – Copy and attach data files to new PC

13. Copy the files indicated in step 5 from your old PC to the new PC. The location will be the same.

14. Execute the following to reattach the database. List the full path to each file identified in step 5 and separate each by commas:

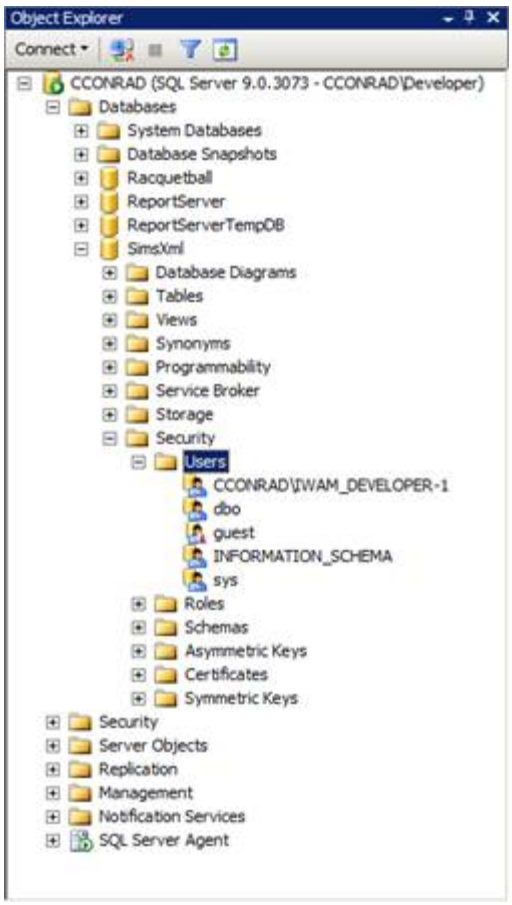
```
USE Master
GO
sp_attach_db ‘SimsXml’, ‘c:\program files\microsoft sql server\mssql.1\mssql\data\simsxml.mdf’, ‘c:\program files\microsoft sql server\mssql.1\mssql\data\simsxml_log.ldf’
GO
```

15. Confirm the Messages window indicates *Command(s) completed successfully*.

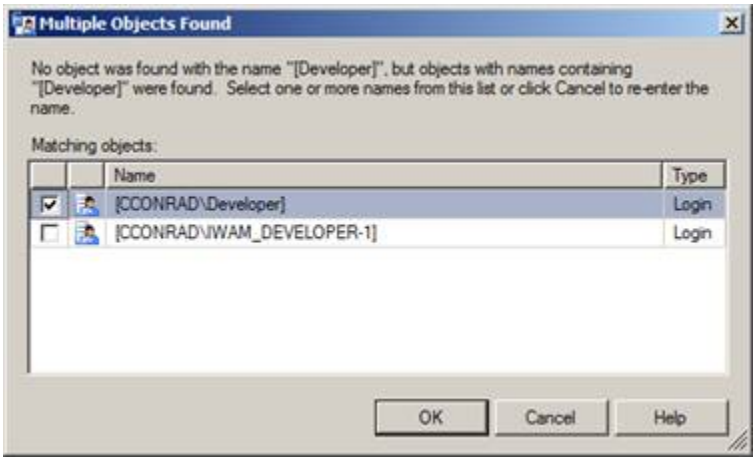


Part 6 – Update login account

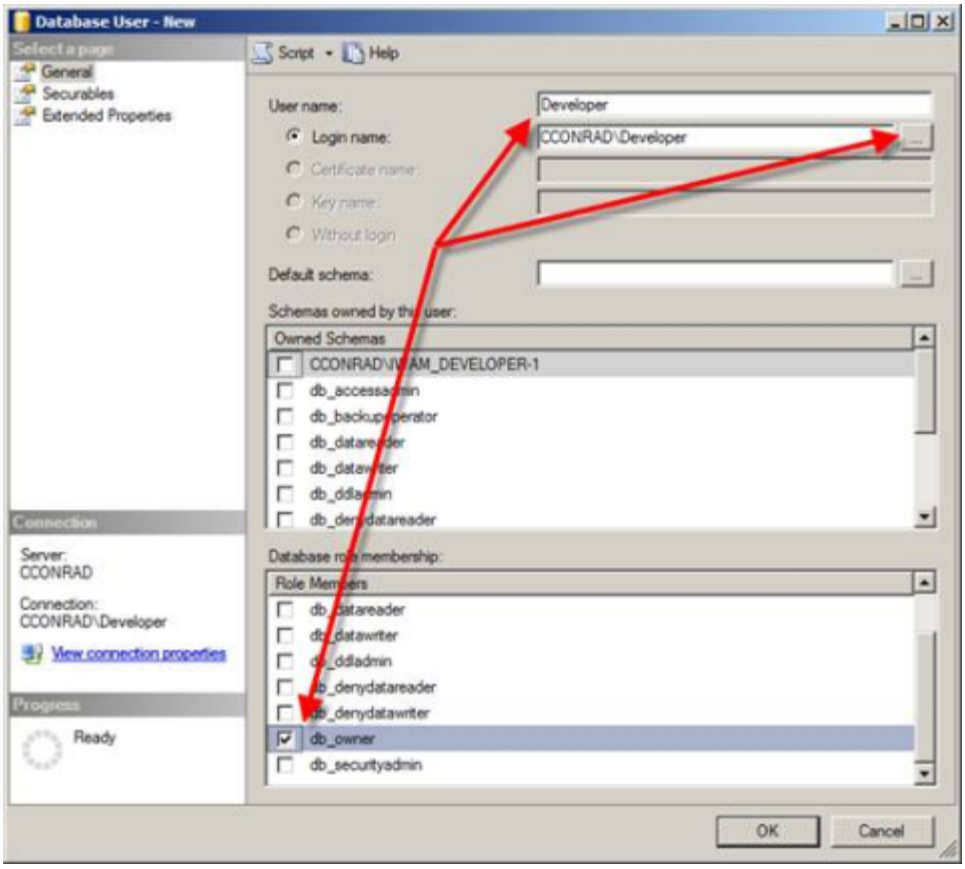
16. In the Object Explorer pane, expand Databases / SimsXml / Security / Users.



17. Right click on **Users** and select **New User…**
18. Enter your current Windows account name in the **User name** field.
19. Click the ellipses button next to the **Login name** field.
20. Enter your current Windows account name and click OK (you could also use the Browse button).
21. If more than one account was found matching the name, you will be prompted to select the correct account.



22. At the bottom of the window, scroll down under **Database role membership** and check the box for **db_owner**. Click OK.



23. This completes the migration process. If you experience problems during the process, and if you cannot access a database that you have moved or if you cannot start SQL Server, examine the SQL Server error log for more information about the errors that you are experiencing.

Moving SIMS Client Server Database to a New PC

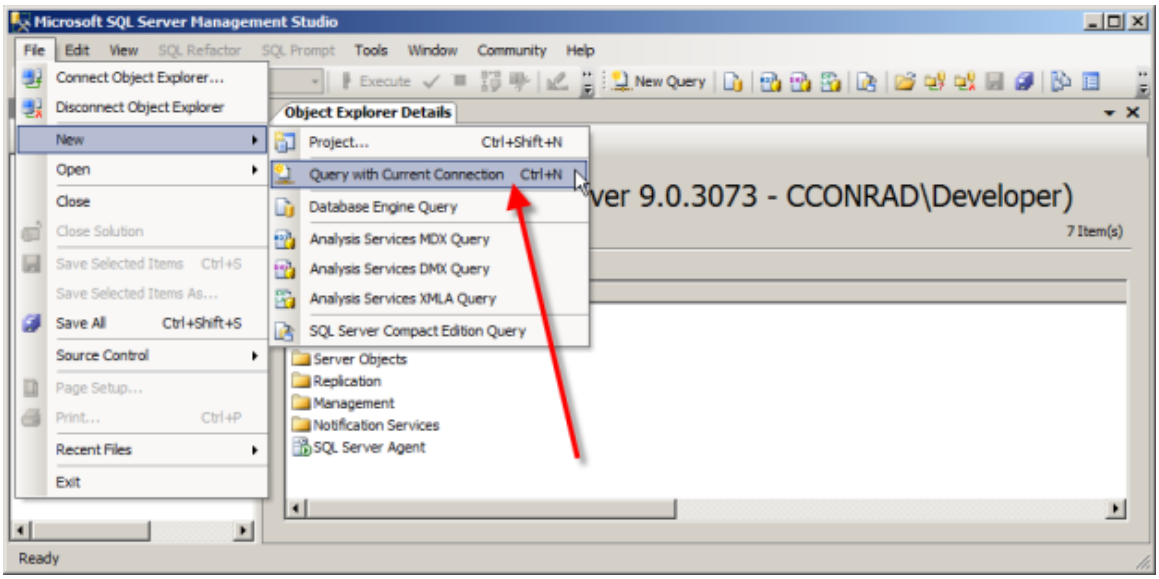
The following steps will guide you through the process of moving SIMS data files to a new machine. This guide assumes SIMS and SQL Server 2005 Express Edition or Standard Edition, or SQL Server 2008 have been installed into the default locations. Both SIMS databases will need to be at the same SIMS Client/Server version to complete this database move.

Part 1 – Install SIMS

The first step is to install SIMS Server on the target PC. Please refer to the *SIMS Installation Guide* for step by step instructions on installing SIMS. Confirm you can login before proceeding.

Part 2 – Locate Source Data Files

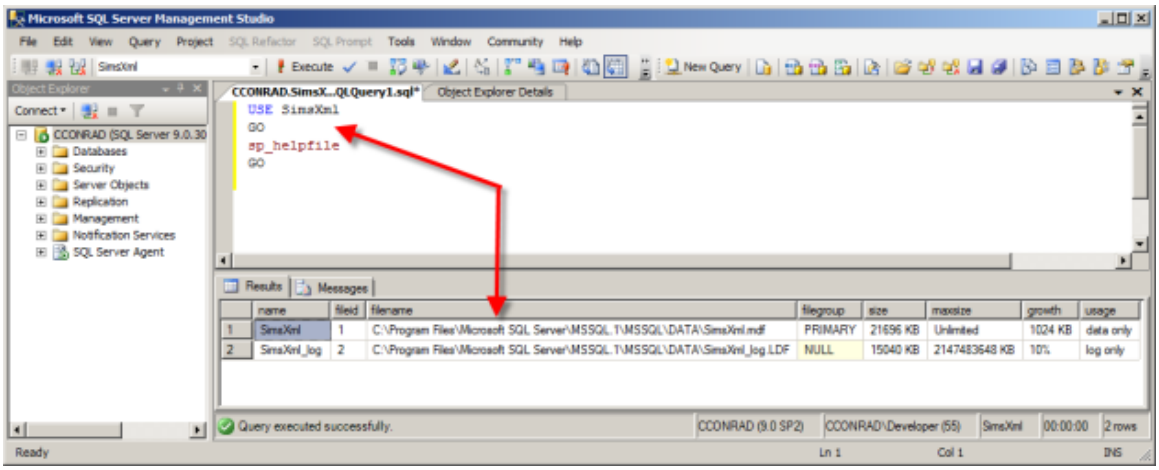
1. Open SQL Server Management Studio on your current SIMS PC.
2. Click Connect on the initial connection dialog.
3. Select File / New / Query with Current Connection.



4. Enter the following and press F5:

```
USE SimsXml
GO
sp_helpfile
GO
```

5. Check the *filename* column in the Result window to identify all the files that make up your SIMS database (there are usually two):


Microsoft SQL Server Management Studio
USE SimsXml
GO
sp_helpfile
GO
Results
Messages
name fileid filename filegroup size maxsize growth usage
1 SimsXml 1 C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\DATA\SimsXml.mdf PRIMARY 21696 KB Unlimited 1024 KB data only
2 SimsXml_log 2 C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\DATA\SimsXml_log.LDF NULL 15040 KB 2147483648 KB 10% log only
Query executed successfully.
Ready

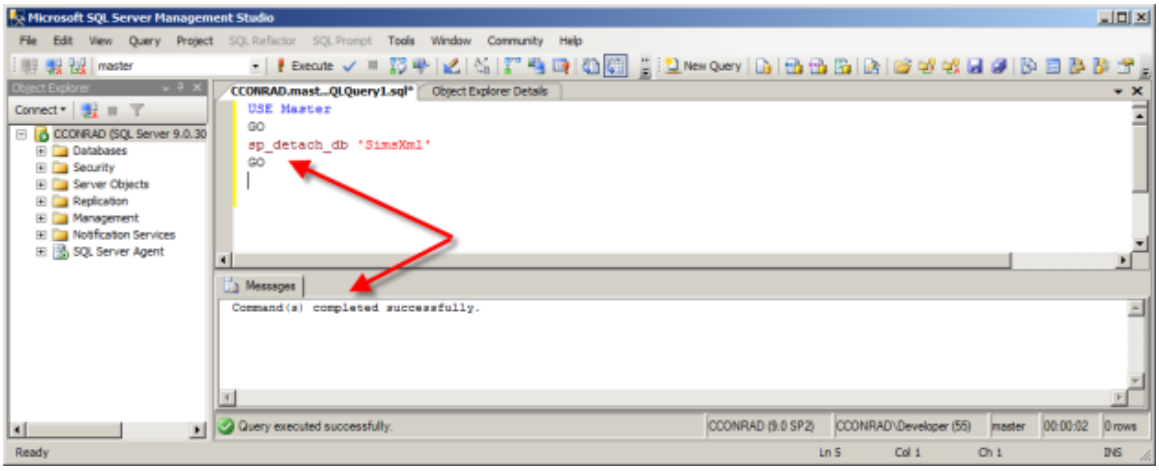
Part 3 – Detach existing database on source PC

6. Replace the current query text with the following and press F5 to detach your database. Note that this will take your current SIMS database offline.

```
USE Master
GO
sp_detach_db 'SimsXml'
```

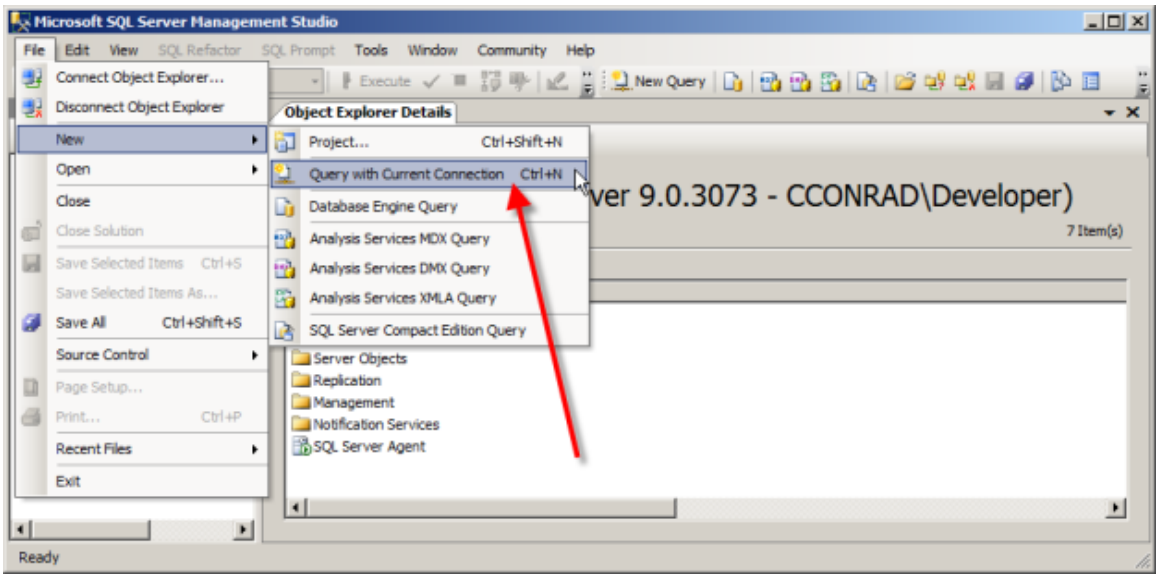
```
GO
```

7. Confirm the Messages window indicates *Command(s) completed successfully*.



Part 4 – Detach new, empty database on target PC

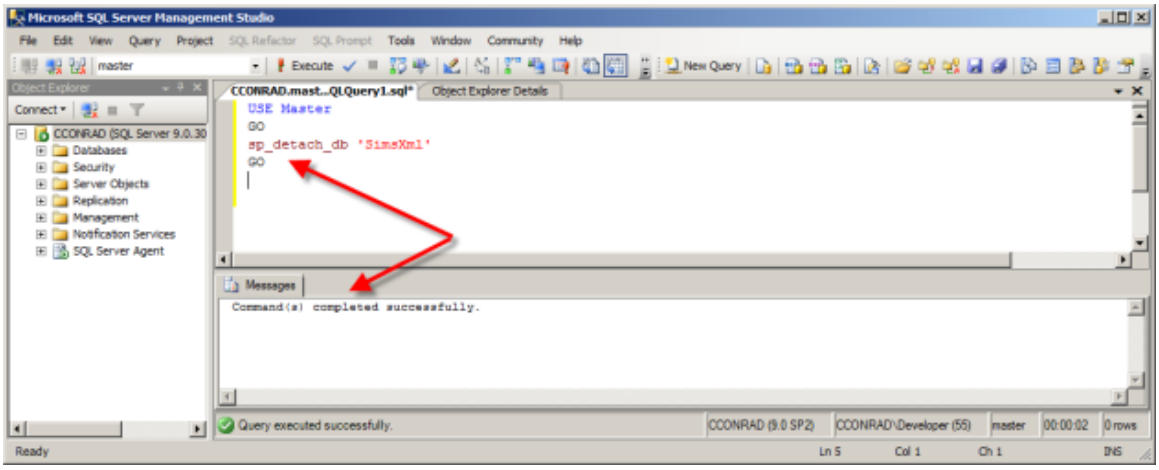
8. Open SQL Server Management Studio on your target PC.
9. Click Connect on the initial connection dialog.
10. Select File / New / Query with Current Connection.



11. Execute the following statement to detach your new, empty database.

```
USE Master
GO
sp_detach_db 'SimsXml'
GO
```

12. Confirm the Messages window indicates *Command(s) completed successfully*.

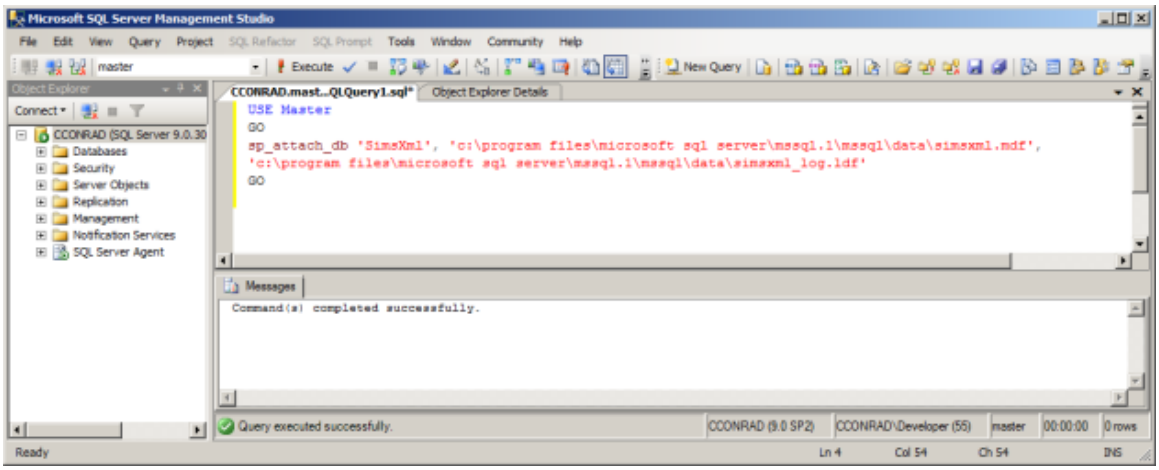


Part 5 – Copy and attach data files to new PC

13. Copy the files indicated in step 5 from your old PC to the new PC. The location will be the same.
14. Execute the following to reattach the database. List the full path to each file identified in step 5 and separate each by commas:

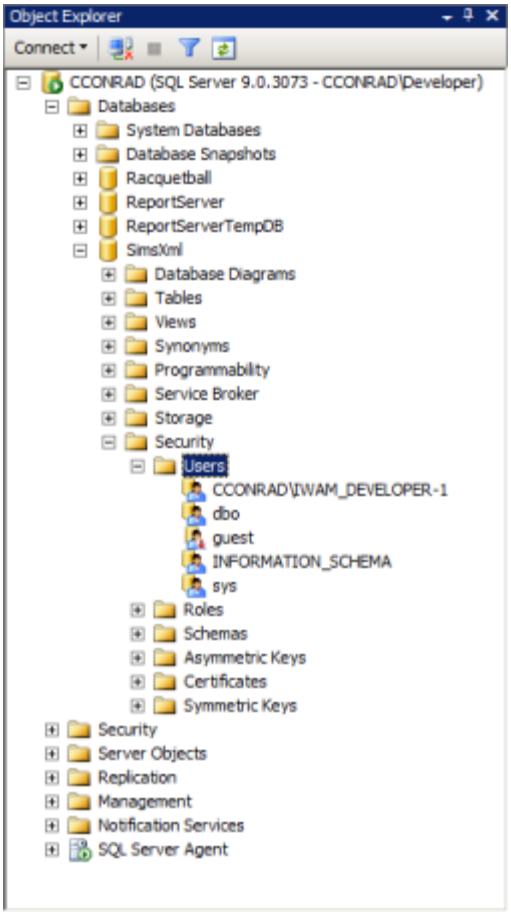
    USE Master
    GO
    sp_attach_db ‘SimsXml’, ‘c:\program files\microsoft sql server\mssql.1\mssql\data\simsxml.mdf’, ‘c:\program files\microsoft sql server\mssql.1\mssql\data\simsxml_log.ldf’
    GO

15. Confirm the Messages window indicates *Command(s) completed successfully*.

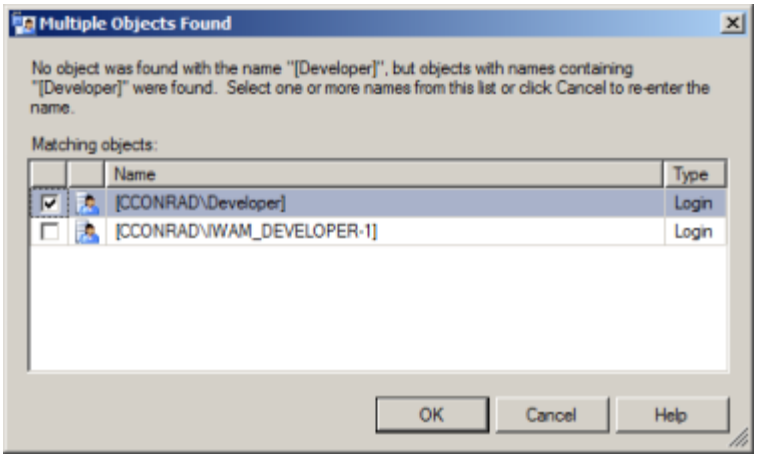


Part 6 – Update login account

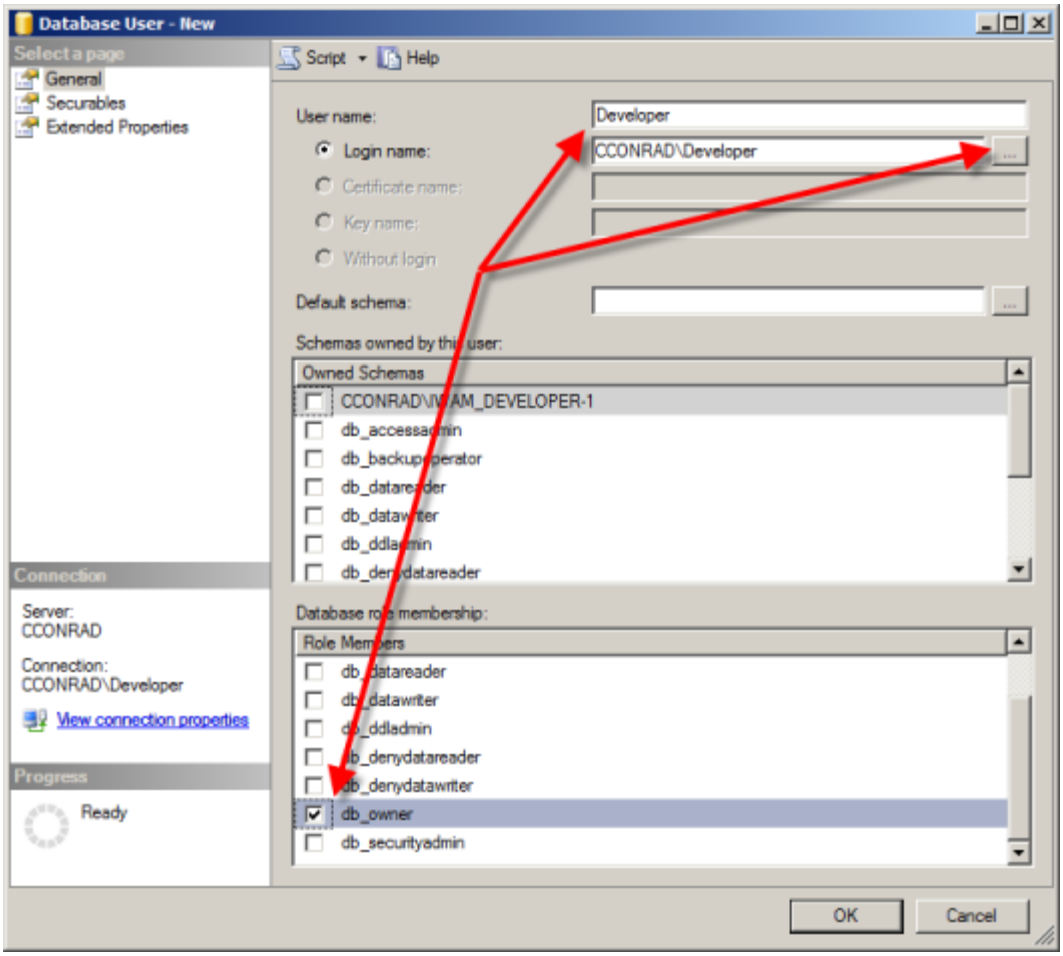
16. In the Object Explorer pane, expand Databases / SimsXml / Security / Users.



17. Right click on **Users** and select **New User…**
18. Enter your current Windows account name in the **User name** field.
19. Click the ellipses button next to the **Login name** field.
20. Enter your current Windows account name and click OK (you could also use the Browse button).
21. If more than one account was found matching the name, you will be prompted to select the correct account.



22. At the bottom of the window, scroll down under **Database role membership** and check the box for **db_owner**. Click OK.



23. This completes the migration process. If you experience problems during the process, and if you cannot access a database that you have moved or if you cannot start SQL Server, examine the SQL Server error log for more information about the errors that you are experiencing.

Quick Reports and Labels

Quick Report Editor

Quick Reports enables users to create reports with formatting options.

The Quick Report Editor is a layout tool for creating a report.

To create a simple report, follow these steps:

1. Click **Query Editor**. Perform a query so that the output list displays the records that you want to report on.

2. In the output list screen, select **Quick Report** from the **Reports** menu.

3. Select the table that you would like to use on the report.

If a table that uses special accesses is selected, a dialog will appear allowing the user to print all special accesses or select specific special accesses from a list. In the Personnel module, an example would be the PersonnelSAs table. Selecting Yes will print all special accesses on the report. Selecting No will allow you to select from a list of special accesses. The Quick Report will display one row for each special access that an individual holds.

The Personnel module's Quick Report dialog has a unique field which allows users to print special accesses on one line for each individual. In the PersonnelOutputList table, there is a field *AllSAs*. This field will display all Special Accesses on one row, separated by a | character. Unlike the PersonnelSAs table, the Special Accesses using this method will include the following conditions:

- *No briefing is required, or*
- *A briefing is required and the briefing date is equal to or less than the current date and there either is no debrief date or the debrief date is greater than the current date.*

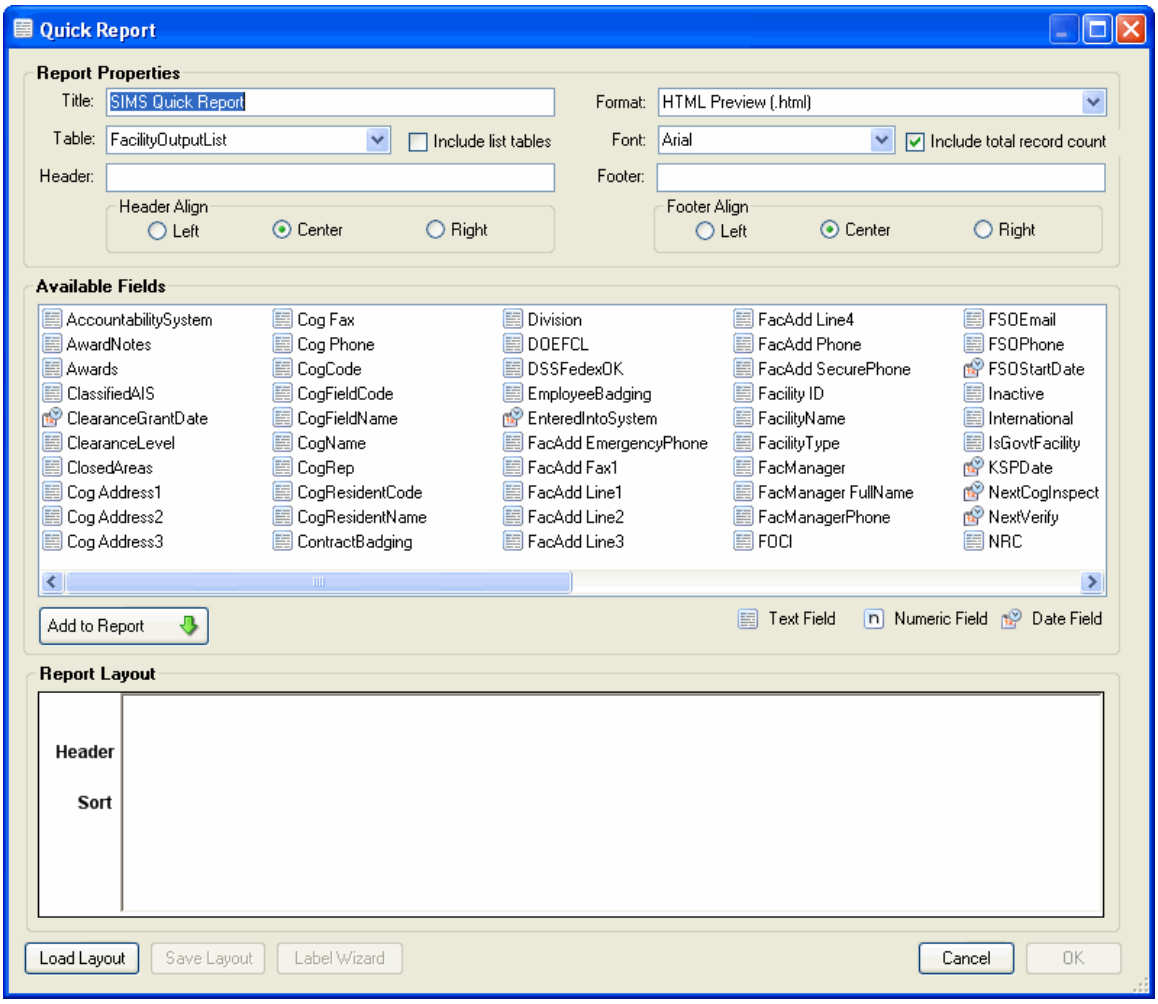
Typically, the "outputlist" table will provide fields needed to generate a report. Select the one table that will provide the fields that you need for your quick report. If there is a need to use fields from multiple tables or allow for particular requirements that are not available using a quick report, a custom report should be built instead. Some programming may be needed when building a custom report. Please refer to the Custom Reports documentation or contact SIMS technical support for further assistance on these types of reports.

4. Highlight the field and choose the "Add to report" button or double-click on the field to add it to the report.

5. Choose to sort on a field by ascending or descending order. Other properties such as the format, font, header, and footer can also be edited.

6. Click the OK button to produce the quick report.

The type of report will be based on the format that was selected in the Quick Report dialog. HTML Preview will launch the report in the default browser. HTML Save As will allow you to save the report as a .HTML file. Delimiter Specified will allow you to specify a delimiter for the .txt file. Comma Separated can be used with Excel. See related topics below.



Report Properties
Edit property values for the report: title, font, format (i.e. HTML, .txt, or .csv), header, and footer. Choose the alignment value for the header and footer. If the "include total record count" check box is checked, the total count will display on the report. Uncheck this box if the total count should not be displayed.
Select the table that will be used to create the report.
Available Fields
Select the fields that you want to report on. Double click on the field or use the Add to Report button.
Sort Order
The Sort order area contains the sorting fields. Choose from ascending or descending order.
Loading and saving a layout
After adding and sorting the fields, the layout can be saved for future use. Use the Save Layout button. When returning to the Quick Report dialog, use the Load Layout button to open the saved file.

Related Topics

Quick Report - Labels

Generating Excel files with Quick Reports

Quick Report - Using Barcode Fields

Generating Excel files with Quick Reports

FIRST, YOU HAVE TO FIND THE RECORDS FOR THE REPORT:

1. Go to Personnel (or the module in which you want to generate an excel report) and pick the search for your records button using the Query Editor or Quick Find.
2. Either create the query conditions or click the Load button and open the Query that you created before.

NEXT, YOU HAVE TO GET THE REPORT FORM:

1. In the output list screen, select **Quick Report** from the **Reports** menu.
2. Select the table that you would like to use on the report.
   Typically, the "outputlist" table will provide fields needed to generate a report. Select the one table that will provide the fields that you need for your quick report. If there is a need to use fields from multiple tables or allow for particular requirements that are not available using a quick report, a custom report should be built instead. Some programming may be needed when building a custom report. Please refer to the Custom Reports documentation or contact SIMS technical support for further assistance on these types of reports.
3. Highlight the field and choose the "Add to report" button or double-click on the field to add it to the report.
4. Choose to sort on a field by ascending or descending order. Other properties such as the format, font, header, and footer can also be edited.

NOW, YOU CAN CREATE AN ELECTRONIC OUTPUT OF THE REPORT.

1. Select the format: Delimiter Specified - Text (.txt) or Comma Separated - Excel (.csv).
   The "Comma Separated - Excel" format is a delimited data format that has fields separated by a comma character and records terminated by newlines. If tabs or carriage returns are used within the SIMS data fields being exported, the "Delimiter Specified - Text" option will allow you to specify a delimiter value so that it will not conflict with characters that may already be used in those data fields. The "Delimiter Specified - Text" format allows you to specify a comma, tab, pipe character, other character, or fixed width. The fixed width option means that the width of each column will be fixed to the number of spaces that is specified. For example, if the fixed width is set to 10, then the column width will be 10. Any data that is longer than this width will be truncated.
2. Click the OK button and save the report file.

CONVERT IT INTO A TRUE EXCEL FILE.

1. Open Excel.
2. Go to the File menu and pick Open.
3. Where it says "Files of Type" pick "Text files..."
4. Open the report file that you just created.
5. When the dialog comes up, pick Next.
6. When the dialog comes up, pick Next.
7. When the dialog comes up, pick Finish.
8. When your report information appears, tidy up the columns to what you would like as a final form.
9. Go to the File menu and pick Save As.
10. Where it says "Save as Type," pick "Microsoft Excel Workbook".
11. Give the file a name and save it.

Related topics:

Quick Report Editor

Quick Report - Labels

Quick Report - Using Barcode Fields

Labels

Labels can be printed while using the Quick Report Editor.

To create a label, follow these steps:

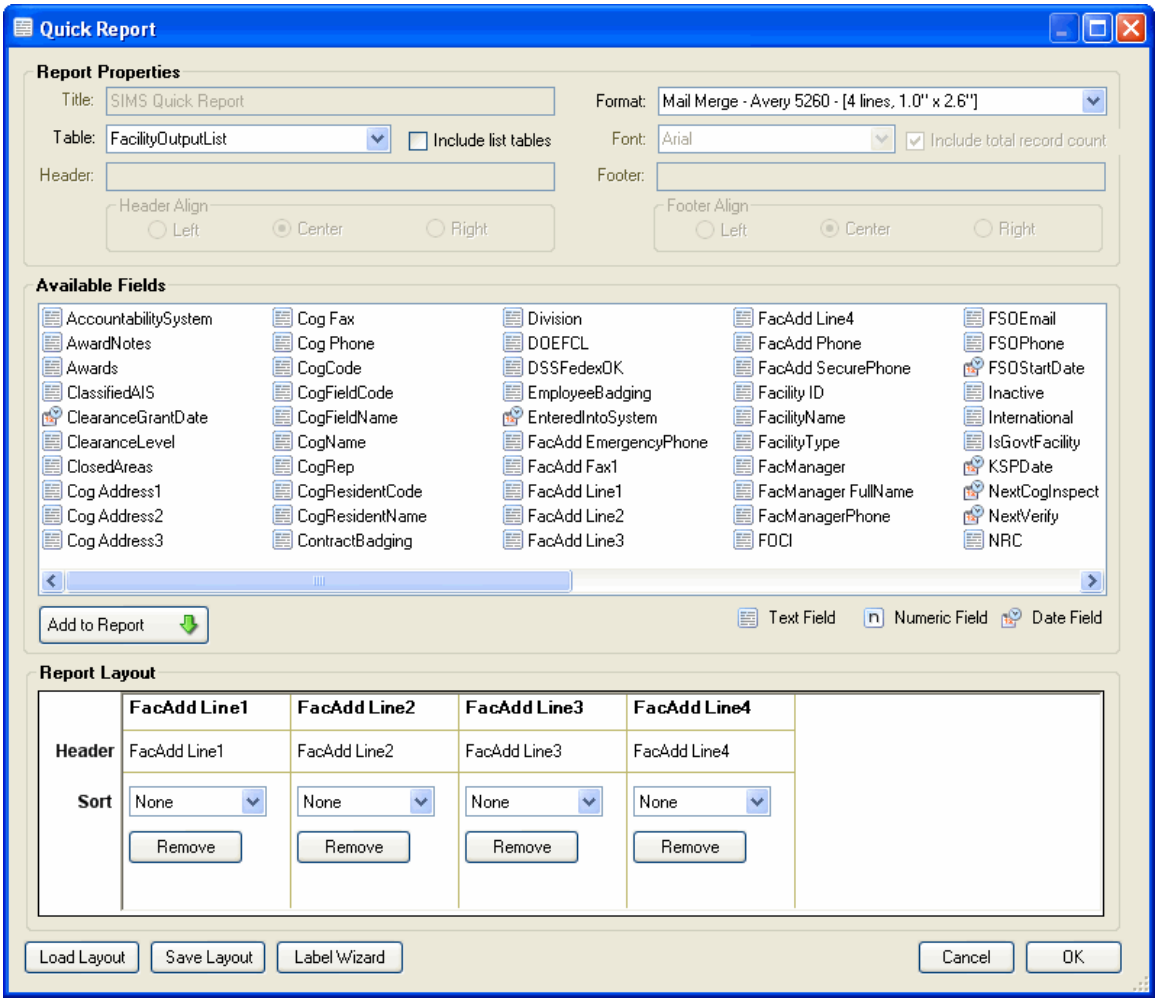
1. Click **Query Editor**. Perform a query so that the output list displays the records that you want to report on.

2. In the output list screen, select **Quick Report** from the **Reports** menu.

3. Select the fields that you want to use on the report. To do so, select the field, and then choose the Add to Report button. Or double click on the field.

4. Select a **Mail Merge** format which appears in the **Format** drop-down list box.

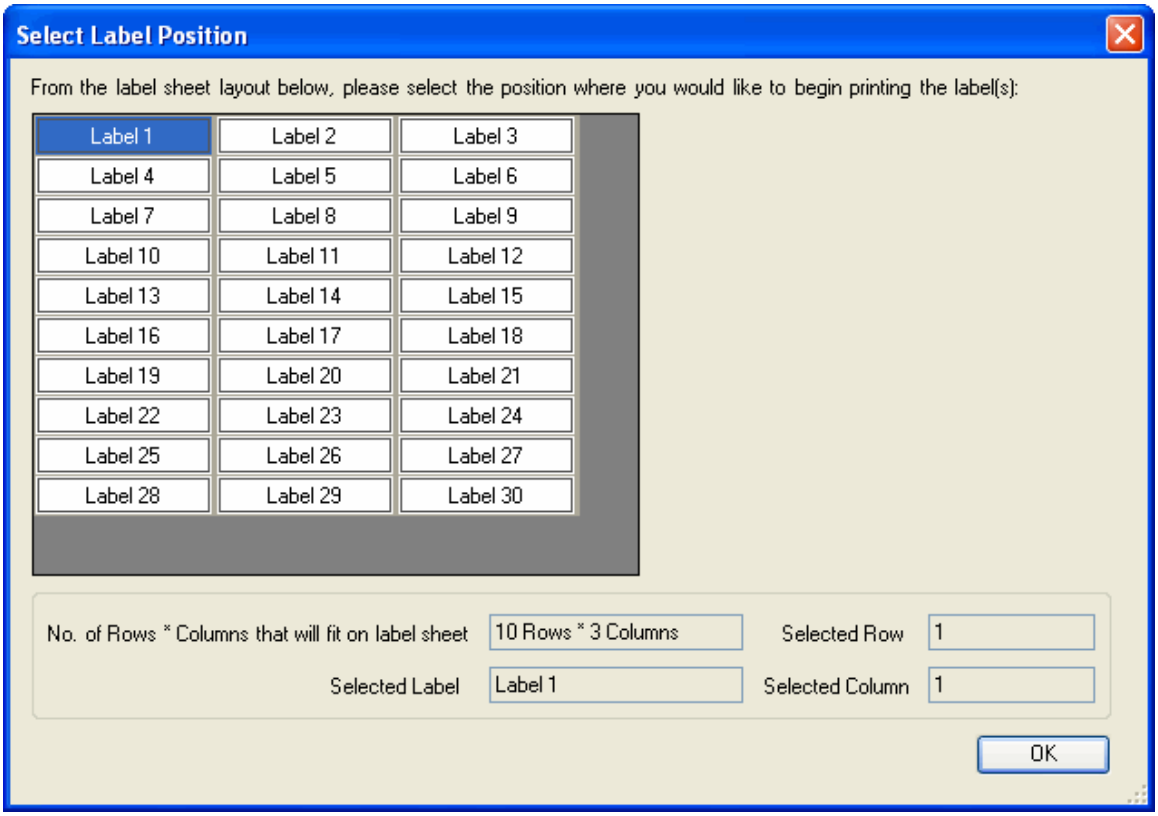
5. Click the **Label Wizard** button. A label wizard will appear so that the start position can be specified when printing a sheet of labels.



Report Properties
Edit property values for the label: font, format.
Select the table that will be used to create the report.
Available Fields
Select the fields that you want to use for the label. Double click on the field or use the Add to Report button.
Loading and saving a layout

After adding and sorting the fields, the layout can be saved for future use. Use the Save Layout button. When returning to the Quick Report dialog, use the Load Layout button to open the saved file.

When selecting one of the mailing labels as a format, a label wizard will appear so that the start position can be specified when printing a sheet of labels.



Using Barcode Fields

Several modules have a ‘Barcode’ field in which the user can enter alpha-numeric characters. The IS module also has an ‘AltBarcode’ field for hardware.

In order for the values entered in the input form and saved in the database to be printed as a barcode, Quick Reports and Custom Reports added an asterisk (‘*’) before and after the alpha-numeric characters. This is required by the ‘code 3 of 9’ (or sometimes called ‘code 39’) barcode representation.

Barcode

The existing column in the database holds just the alpha-numeric characters.

Barcode3of9

The Barcode3of9 column does not actually hold any values. Instead, it calculates its value from the value of the Barcode column. If the Barcode is NULL, the Barcode3of9 column will be NULL. If the Barcode contains a value, the Barcode3of9 will return the value with asterisks before and after it. The same applies to the AltBarcode3of9 column in the AISHardware table.

Reports that Used the Barcode Field Prior to Barcode3of9

Quick Reports

A saved report layout containing a Barcode field will not print with asterisks. The most likely problem caused by this change is that labels created by using one of the mail merge options from the ‘Format’ drop-down menu on the Quick Report dialog will not be readable by a barcode scanner. Selecting the ‘Barcode (Code 3 of 9)’ [or ‘Alternate Barcode (Code 3 of 9)’ for the AISHardware table] and saving the layout will correct the problem.

Custom Reports

Existing reports and any custom reports have to include code to explicitly add asterisks before and after the value from the database if they display it as a barcode (instead of alpha-numeric text). Since they used the Barcode field and its behavior has not changed, all the reports should continue to work as they did.

Using the Barcode3of9 field

Which barcode field to use on a Quick Report depends upon the desired result.

Quick Reports - HTML, Text, or Excel Formats

Use the ‘Barcode’ field to get just the alpha-numeric characters or ‘Barcode (Code 3 of 9)’ to get asterisks before and after the alpha-numeric characters.

Quick Reports - Mail Merge Labels

Use the ‘Barcode (Code 3 of 9)’ to get a barcode the scanner can read and/or ‘Barcode’ to get the alpha-numeric charaters a human can read.

Quick Reports - Label Wizard

Use the ‘Barcode’ to get a barcode the scanner can read. The ‘Barcode (Code 3 of 9)’ field is not supported and will result in ‘There are invalid characters in the text’ appearing in the labels.

Custom Reports

Use the new ‘Barcode (Code 3 of 9)’ field and a Code39 font type to display a barcode the scanner can read. Other font types will display the asterisks before and after the alpha-numeric characters.

Use the ‘Barcode’ field to display human-readable alpha-numeric characters.

SQL Task Scheduling

SQL Task Scheduling

Microsoft knowledgebase article for 'How to schedule and automate backups of SQL Server databases in SQL Server Express Editions'.

http://support.microsoft.com/kb/2019698

For Customer:

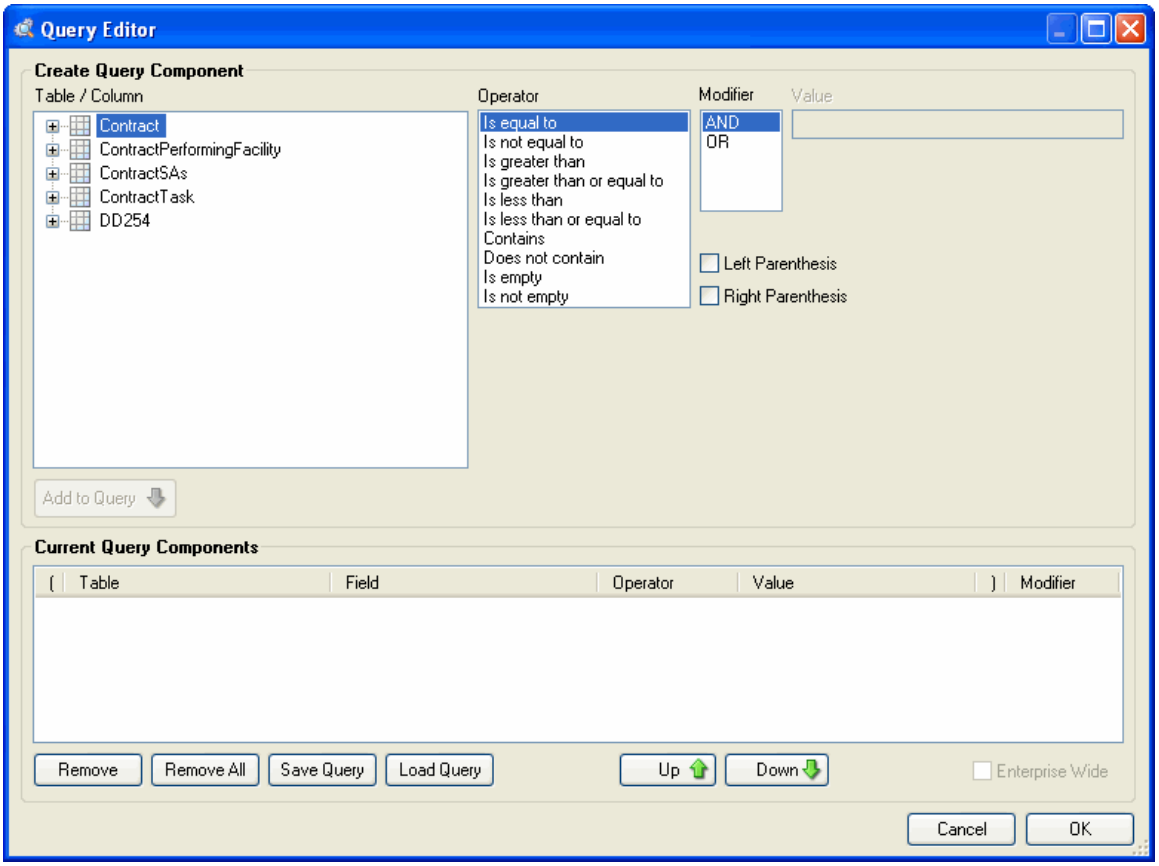
In addition to daily SQL backups, we strongly recommend using a comprehensive backup program that images the entire drive including Windows and all programs. They can be purchased for less than $50. This should run at least once a week. Microsoft has a workaround for SQL Express backups in their knowledgebase (http://support.microsoft.com/kb/2019698). However, SIMS makes no warranties regarding the suitability or reliability of this workaround and it should not be your only form of backup.

Appendix - Query Editor Fields

Classified Contracts - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.

Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.
Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Classified Contracts

The table below lists fields in the Classified Contracts module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
ID	Containers	ContainerID		
Accountability#	Containers	AccountNumber		
Barcode	Containers	Barcode		
StorageLevel	Containers	Storage_Level_ID	Levels	Name
Location	Containers	ContainerLocation_ID	ContainerLocation	ContainerLocation
PrimeCustodian	ContainerTrail	PrimeCustodianID		
FacilityID	Containers	Facility_ID	Facility	FacilityID
Data Group	Containers	UserGroup_ID	UserGroups	GroupName

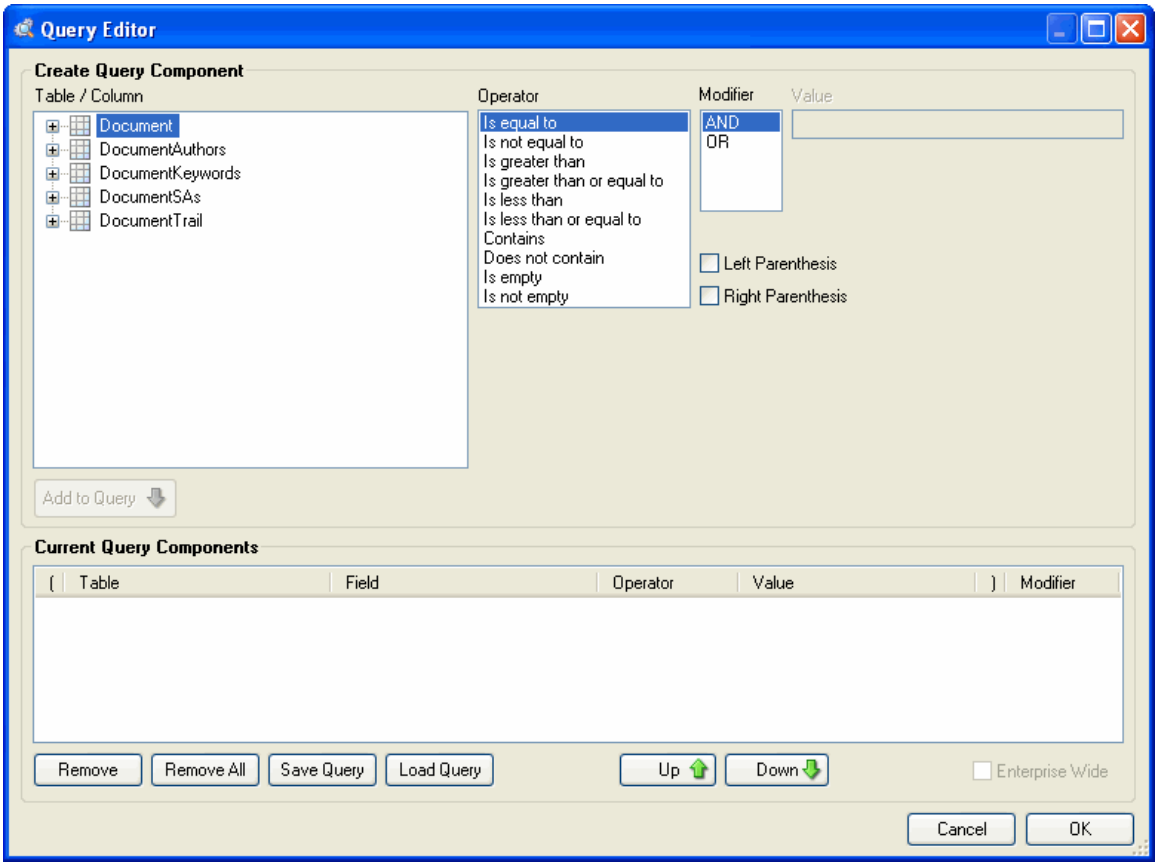
Combination Changed	Containers	ComboChangeDate		
Combination Expires	Containers	ComboExpirationDate		
Type	Containers	ContainerType_ID	ContainerType	ContainerType
Maker	Containers	Maker		
Serial Number	Containers	SeralNumber		
Model	Containers	Model		
Rated Level	Containers	Rated_Level_ID	Levels	Name
Multiple Drawer	Containers	MulipleDrawer		
Drawers	Containers	DrawerCount		
Inactive	Containers	Inactive		
Alarmed	Containers	Alarmed		
Special Accesses	ContainerSAs	SA_ID	SA	SAName
Personnel Accesses Tab				
Name	ContainerCustodians	Personnel_ID	Personnel	LastName
ID	ContainerCustodians	Personnel_ID	Personnel	PersonnelID
Denied	ContainerCustodians	AccessDenied		
Granted	ContainerCustodians	AccessGranted		
Access Type	ContainerCustodians	ContainerAccessType_ID	ContainerAccessType	ContainerAccessType

Audit Trail Tab				
Action Date and Time	ContainerTrail	ActionDate		
Combo Changed Date	ContainerTrail	ComboChanged		
Next Combo Changed Date	ContainerTrail	NextComboChanged		
StorageLevel	ContainerTrail	Store_Level_ID	Levels	Name
Location	ContainerTrail	ContainerLocation_ID	ContainerLocation	ContainerLocation
Custodian ID	ContainerTrail	PrimeCustodianID		
Custodian Name	ContainerTrail	PrimeCustodianName		
Note	ContainerTrail	Note		
Remarks Tab				
Remarks	Containers	Remarks		

Classified Documents - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.

Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.
Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Documents

The table below lists fields in the Classified Documents module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
Document Number	Document	DocumentNumber		
Archived	Document	Archived		
Accountable	Document	Accountable		
Stream	Document	Stream		
Number of Enclosures	Document	Enclosures		
Barcode	Document	Barcode		

Classification	Document	Classification_Level_ID	Levels	Name
Serial #	Document	SerialNumber		
Pages	Document	Pages		
Generated	Document	Generated		
Type	Document	DocumentType_ID	DocumentType	DocumentType
Media Type	Document	DocumentMediaType_ID	DocumentMediaType	DocumentMediaType
Destruction	Document	RestrictDst		
Transfer	Document	RestrictTrn		
Copy	Document	RestrictCpy		
Data Group	Document	UserGroup_ID	UserGoups	GroupName
Title	Document	DocumentTitle		
Custodian	Document	Custodian_Personnel_ID	Personnel	PersonnnelID
Container ID	Document	Container_ID	Containers	ContainerID
Contract ID	Document	Contract_ID	Contract	ContractID
Status	Document	DocumentStatus_ID	DocumentStatus	DocumentStatus
Project	Document	Project		
Document Date	Document	DocumentDate		
Signed For	Document	SignedForDate		
Origin Tab				
Document Date	Document	DocumentDate		
Rec/Gen Date				

Signed For	Document	SignedForDate		
Agency	Document	Agency		
From	Document	ReceivedFrom		
How Received				
Receipt #	Document	ReceiptNumber		
Entered Into System	Document	EnteredInSystemDate		
Control #	Document	ControlNumber		
Cross Ref #	Document	CrossRefNumber		
Fax #	Document	FAXNumber		
Authors	DocumentAuthors	Author_ID	Authors	
Status Tab				
Declassify On	Document	DeclassDate		
Downgrade On	Document	DowngradeDate		
Level	Document	Downgrade_Level_ID	Levels	Name
Other	Document	DowngradeOther		
Review On	Document	ReviewDate		
Authority	Document	DowngradeAuth		
Derived From	Document	DerivedFrom		
X1	Document	X1		
X2	Document	X2		
X3	Document	X3		
X4	Document	X4		

X5	Document	X5		
X6	Document	X6		
X7	Document	X7		
X8	Document	X8		
X9	Document	X9		
OADR	Document	OADR		
Declassification Date	Document	DeclassDate		
Manual Review	Document	ManReviewDeclas		
Retention Authorized	Document	RetentionAuth		
Letter Sent	Document	RetentionLetterSent Date		
Retain Until	Document	RetainUntilDate		
Loaned	Document	Loaned		
Loaned To	Document	Custodian_Personnel_ID	Personnel	PersonnelID
Phone	Document	Custodian_Personnel_ID	Personnel	WorkPhone
Loan Date	Document	LoanDate		
Date Due	Document	LoanDueDate		
Last Audit	Document	LastAuditDate		
LastInventory	Document	InventoryDate		
Sent To Facility	Document	SentTo_Facility_ID	FacilityID	
Dispatched	Document	DispatchDate		
Suspense	Document	SuspenseDate		

Receipt #	Document	ReceiptNumber		
Sent/Dest By	Document	SentDestroyBy		
Witness	Document	DestroyWitness		
Method	Document	DocumentDestroyMethod_ID	DocumentDestroyMethod	DocumentDestroyMethod
Audit Trail Tab - New Entry				
New Entry				
Type	DocumentTrail	Transtype		
New Entry Date	DocumentTrail	TransDate		
Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - Internal Transfer				
Internal Transfer				
Type	DocumentTrail	Transtype		
Receipt No.	DocumentTrail	ReceiptNumber		
Date	DocumentTrail	TransDate		
Perform Date	DocumentTrail	PerformDate		

Receipt Returned	DocumentTrail	ReceiptReturn		
Receipt Return Date	DocumentTrail	ReceiptReturnDate		
From Custodian Name (Personnel)	DocumentTrail	OldCustodian_Personnel_ID	PersonnelID	FirstName/LastName/MiddleName
From Custodian Name (Visitor)	DocumentTrail	OldCustodian_Visitor_ID	VisitAuthorizationVisitors	FirstName/LastName/MiddleName
From Custodian ID (Personnel)	DocumentTrail	OldCustodian_Personnel_ID	PersonnelID	PersonnelID
From Custodian ID (Visitor)	DocumentTrail	OldCustodian_Visitor_ID	VisitAuthorizationVisitors	VisitorID
To Custodian Name (Personnel)	DocumentTrail	NewCustodian_Personnel_ID	PersonnelID	FirstName/LastName/MiddleName
To Custodian Name (Visitor)	DocumentTrail	NewCustodian_Visitor_ID	VisitAuthorizationVisitors	FirstName/LastName/MiddleName
To Custodian ID (Personnel)	DocumentTrail	NewCustodian_Personnel_ID	PersonnelID	PersonnelID
To Custodian ID (Visitor)	DocumentTrail	NewCustodian_Visitor_ID	VisitAuthorizationVisitors	VisitorID
Signed for Date	DocumentTrail	SignedForDate		
Old Container ID	DocumentTrail	OldContainer_ID	Containers	ContainerID
New Container ID	DocumentTrail	NewContainer_ID	Containers	ContainerID
From Facility ID	DocumentTrail	FromFacilityID		
From Facility Name	DocumentTrail	FromFacilityName		
From Facility Address 1	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line1
From Facility Address 2	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line2
From Facility Address 3	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line3

From Facility Address 4	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line4
Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - External Transfer				
External Transfer				
Type	DocumentTrail	Transtype		
Receipt Number	DocumentTrail	ReceiptNumber		
Tracer Count	DocumentTrail	TracerCount		
Date	DocumentTrail	TransDate		
Perform Date	DocumentTrail	PerformDate		
Suspense Date	DocumentTrail	SuspenseDate		
Receipt Return Date	DocumentTrail	ReceiptReturnDate		
Recipt Returned	DocumentTrail	ReceiptReturned		
Authorized By Name (Personnel)	DocumentTrail	AuthorizedBy_Personnel_ID	Personnel	FirstName/LastName/MiddleName
Authorized By Name (Visitor)	DocumentTrail	AuthorizedBy_Visitor_ID	VisitAuthorizationVisitors	FirstName/LastName/MiddleName
Authorized By ID (Personnel)	DocumentTrail	AuthorizedBy_Personnel_ID	Personnel	PersonnelID

Authorized By ID (Visitor)	DocumentTrail	AuthorizedBy_Visitor_ID	VisitAuthorizationVisitors	VisitorID
From Facility ID	DocumentTrail	FromFacilityID		
From Facility Name	DocumentTrail	FromFacilityName		
From Facility Address 1	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line1
From Facility Address 2	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line2
From Facility Address 3	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line3
From Facility Address 4	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line4
To Facility ID	DocumentTrail	SentToFacilityID		
To Facility Name	DocumentTrail	SentToFacilityName		
To Facility Address 1	DocumentTrail	SentTo_FacilityAddress_ID	FacilityAddress	Line1
To Facility Address 2	DocumentTrail	SentTo_FacilityAddress_ID	FacilityAddress	Line2
To Facility Address 3	DocumentTrail	SentTo_FacilityAddress_ID	FacilityAddress	Line3
To Facility Address 4	DocumentTrail	SentTo_FacilityAddress_ID	FacilityAddress	Line4
Method	DocumentTrail	SendMethod_ID	DocumentSendMethod	DocumentSendMethod
Courier Name (Personnel)	DocumentTrail	Courier_Personnel_ID	Personnel	FirstName/LastName/MiddleName
Courier Name (Visitor)	DocumentTrail	Courier_Visitor_ID	VisitAuthorizationVisitors	FirstName/LastName/MiddleName
Courier ID (Personnel)	DocumentTrail	Courier_Personnel_ID	Personnel	PersonnelID

Courier Name (Visitor)	DocumentTrail	Courier_Visitor_ID	VisitAuthorizationVisitors	VisitorID
Attention	DocumentTrail	Attention		
Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - Return To Accountability				
Return To Accountability				
Type	DocumentTrail	Transtype		
Date	DocumentTrail	TransDate		
Perform Date	DocumentTrail	PerformDate		
Receipt Returned	DocumentTrail	ReceiptReturned		
From Facility Name	DocumentTrail	FromFacilityName		
From Facility Address 1	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line1
From Facility Address 2	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line2
From Facility Address 3	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line3
From Facility Address 4	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line4

Method	DocumentTrail	SendMethod_ID	DocumentSendMethod	DocumentSendMethod
Custodian Name (Personnel)	DocumentTrail	NewCustodian_Personnel_ID	PersonnelID	FirstName/LastName/MiddleName
Custodian Name (Visitor)	DocumentTrail	NewCustodian_Visitor_ID	VisitAuthorizationVisitors	FirstName/LastName/MiddleName
Custodian ID (Personnel)	DocumentTrail	NewCustodian_Personnel_ID	PersonnelID	PersonnelID
Custodian ID (Visitor)	DocumentTrail	NewCustodian_Visitor_ID	VisitAuthorizationVisitors	VisitorID
Signed For Date	DocumentTrail	SignedForDate		
Container	DocumentTrail	NewContainer_ID	Containers	ContainerID
Contract	DocumentTrail	NewContract_ID	Contract	ContainerID
Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - Destruction				
Destruction				
Type	DocumentTrail	Transtype		
Receipt No.	DocumentTrail	ReceiptNumber		
Date	DocumentTrail	TransDate		
Perform Date	DocumentTrail	PerformDate		

Method	DocumentTrail	SendMethod_ID	DocumentSendMethod	DocumentSendMethod
Print Titles	DocumentTrail	PrintDocumentTitles		
Destroyed By Name (Personnel)	DocumentTrail	PerformedBy_Personnel_ID	PersonnelID	FirstName/LastName/MiddleName
Destroyed By Name (Visitor)	DocumentTrail	PerformedBy_Visitor_ID	VisitAuthorizationVisitors	FirstName/LastName/MiddleName
Destroyed By ID (Personnel)	DocumentTrail	PerformedBy_Personnel_ID	PersonnelID	PersonnelID
Destroyed By ID (Visitor)	DocumentTrail	PerformedBy_Visitor_ID	VisitAuthorizationVisitors	VisitorID
Witness Name (Personnel)	DocumentTrail	Witness_Personnel_ID	PersonnelID	FirstName/LastName/MiddleName
Witness Name (Visitor)	DocumentTrail	Witness_Visitor_ID	VisitAuthorizationVisitors	FirstName/LastName/MiddleName
Witness ID (Personnel)	DocumentTrail	Witness_Personnel_ID	PersonnelID	PersonnelID
Witness ID (Visitor)	DocumentTrail	Witness_Visitor_ID	VisitAuthorizationVisitors	VisitorID
From Facility Name	DocumentTrail	FromFacilityName		
From Facility Address 1	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line1
From Facility Address 2	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line2
From Facility Address 3	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line3
From Facility Address 4	DocumentTrail	From_Facility_Address_ID	FacilityAddress	Line4
Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		

Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - Contract Transfer				
Contract Transfer				
Type	DocumentTrail	Transtype		
Date	DocumentTrail	TransDate		
Perform Date	DocumentTrail	PerformDate		
Old Contract	DocumentTrail	OldContract_ID	Contract	ContainerID
New Contract	DocumentTrail	NewContract_ID	Contract	ContainerID
Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - Retention				
Retention				
Type	DocumentTrail	Transtype		
Date	DocumentTrail	TransDate		
Retain Until Date	DocumentTrail	RetainUntilDate		

Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - Regrade Classification				
Regrade				
Type	DocumentTrail	Transtype		
Date	DocumentTrail	TransDate		
Performed By Name	DocumentTrail	PerformedBy_Personnel_ID	PersonnelID	FirstName/LastName/MiddleName
Performed By ID	DocumentTrail	PerformedBy_Personnel_ID	PersonnelID	PersonnelID
New Classification	DocumentTrail	NewClassification		
Make Documents Unaccountable	DocumentTrail	DocumentUnaccountable		
Declassification	DocumentTrail	Declassification		
Authority	DocumentTrail	Authority		
Make Documents Archived	DocumentTrail	DocumentArchived		
Comments				
User Name	DocumentTrail	UserName		

Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - Incorporation				
Regrade				
Type	DocumentTrail	Transtype		
Date	DocumentTrail	TransDate		
Perform Date	DocumentTrail	PerformDate		
Performed By Name	DocumentTrail	PerformedBy_Personnel_ID	PersonnelID	FirstName/LastName/MiddleName
Performed By ID	DocumentTrail	PerformedBy_Personnel_ID	PersonnelID	PersonnelID
Type	DocumentTrail	IncorporationType		
Destination Document Number		DestinationDocumentNumber		
Archived	Document	Archived		
Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		

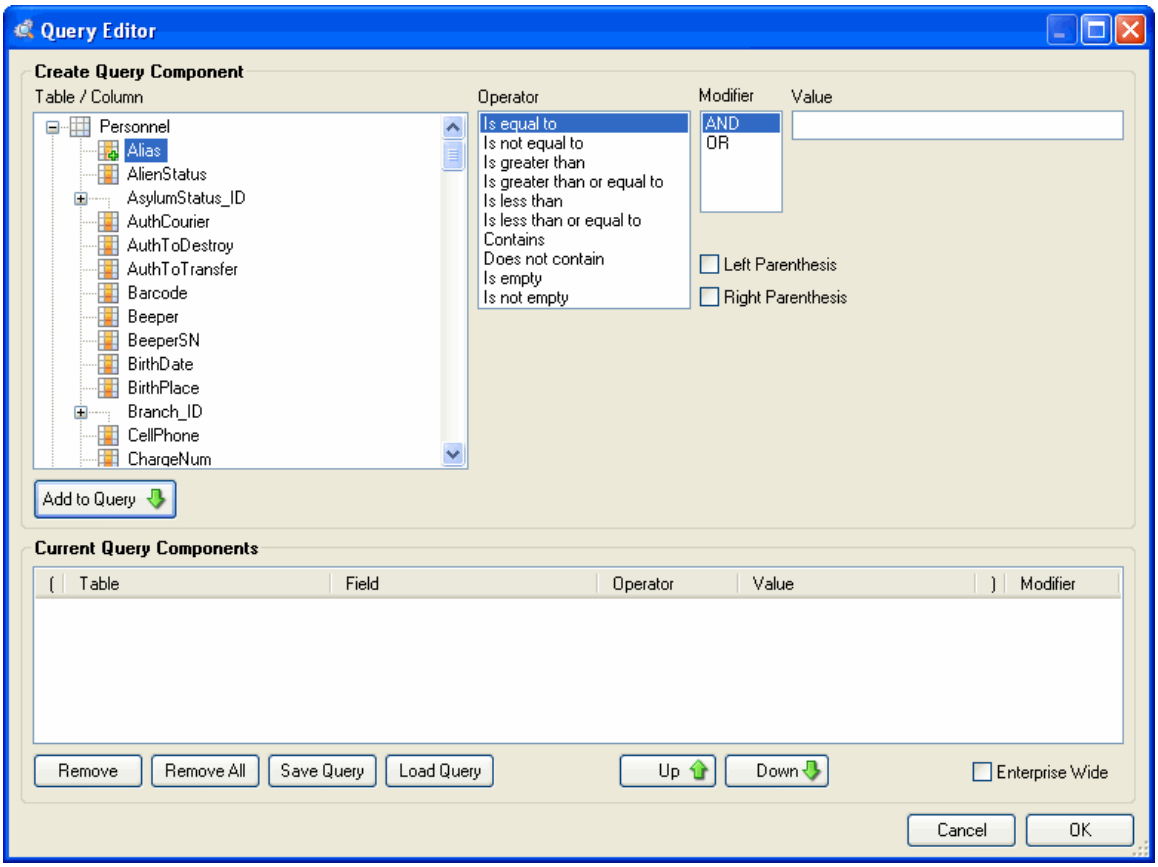
Audit Trail - Loan Out				
Loan Out				
Type	DocumentTrail	Transtype		
Loan Out Date	DocumentTrail	PerformDate		
Date	DocumentTrail	TransDate		
Due Date	DocumentTrail	LoanDueDate		
Loan To Name	DocumentTrail	LoanToName		
Loan To ID	DocumentTrail	LoanToID		
Loan To Phone	DocumentTrail	LoanToPhone		
Comments				
User Name	DocumentTrail	UserName		
Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Audit Trail - Loan In				
Loan In				
Type	DocumentTrail	Transtype		
Return Date	DocumentTrail	LoanReturnDate		
Date	DocumentTrail	TransDate		
Comments				
User Name	DocumentTrail	UserName		

Workstation	DocumentTrail	WorkStation		
Comments	DocumentTrail	Comment		
Remarks				
Remarks	DocumentTrail	Remarks		
Abstract Tab				
Abstract	Document	Abstract		
Keywords/Special Accesses Tab				
Keywords	DocumentKeywords	Keyword_ID	Keywords	Keyword
Special Accesses	DocumentSAs	SA_ID	SA	SAName
Remarks Tab				
Remarks	Document	Remarks		

Classified Personnel - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
Enterprise Wide	If filters are turned on in System Customization Data Group Filters, the query will search only the filtered records. Select this option if you want to query on the entire module instead.
OK	Click to start the search.
Cancel	Click to close the screen.

Classified Personnel

The table below lists fields in the Classified Personnel module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
ID	Personnel	PersonnelID		
Last Name	Personnel	LastName		
First Name	Personnel	FirstName		
Middle Name	Personnel	MiddleName		
SSN	Personnel	SSN		
Terminated				
Key Management Personnel	Personnel	KMP		
SCI	Personnel	SCI		
Facility_ID	Personnel	Facility	Facility_ID	FacilityID
Employee #	Personnel	EmployeeNumber		
Barcode	Personnel	Barcode		

Work Phone	Personnel	WorkPhone		
E-mail	Personnel	Email		
Grade/Rank/Rate	Personnel	GradeRankRate		
Department	Personnel	Department_ID	PersonnelDepartment	Department
Location	Personnel	Location_ID	PersonnelLocation	Location
Division	Personnel	Division_ID	PersonnelDivision	Division
Employment Status	Personnel	EmployeeStatus_ID	PersonnnelEmployeeStatus	EmployeeStatus
Employee Type	Personnel	Employee_ID	PersonnnelEmployeeType	EmployeeType
Destroy	Personnel	AuthToDestroy		
Transfer	Personnel	AuthToTransfer		
Courier	Personnel	AuthToCourier		
Overseas	Personnel	Overseas		
DSS Notifiied	Personnel	DSSNotified		
Renewed	Personnel	OverseasRenewal		
Clearance Tab				
Clearance Information				
Facility ID	PersonnelClearanceCases	FacilityID		
Level	PersonnelClearanceCases	Levels_ID	Levels	Name
Status	PersonnelClearanceCases	ClearanceStatus_ID	PersonnelClearanceStatus	ClearanceStatus

Agency	PersonnelClearanceCases	Agency_ID	PersonnelAgency	Agency
Type	PersonnelClearanceCases	ClearanceType_ID	PersonnelClearanceType	ClearanceType
Basis	PersonnelClearanceCases	ClearanceBasis_ID	PersonnelClearanceBasis	ClearanceBasis
Billet #	PersonnelClearanceCases	Billet		
Clearance #	PersonnelClearanceCases	ClearNumber		
DSS	PersonnelClearanceCases	DSSType_ID	PersonnelDSSType	DSSType
Last Action	PersonnelClearanceCases	ClearanceAction_ID	PersonnelClearanceAction	ClearanceAction
Granted By	PersonnelClearanceCases	GrantedBy		
Administrative Termination	PersonnelClearanceCases	AdminTerm		
Granted	PersonnelClearanceCases	GrantDate		
Investigated	PersonnelClearanceCases	InvestDate		
Reinvestigation Notification	PersonnelClearanceCases	ReinvestNotify		
Next Brief	PersonnelClearanceCases	NextBriefDate		
Briefed	PersonnelClearanceCases	BriefDate		
Rebriefed	PersonnelClearanceCases	Rebriefed		
Debriefed	PersonnelClearanceCases	DebriefDate		

DCID	PersonnelClearanceCases	DCID		
Last Held	PersonnelClearanceCases	LastHeld		
Expires	PersonnelClearanceCases	Expires		
Applications/Polygraph				
562 Submitted	PersonnelClearanceCases	Submitted562		
PSQ App Pending	PersonnelClearanceCases	PSQAppPending		
Clearance Waiver	PersonnelClearanceCases	ClearWaiver		
PR Submitted	PersonnelClearanceCases	PRSubmitted		
Basis	PersonnelClearanceCases	PSQ_Basis_ID	PersonnelClearanceBasis	ClearanceBasis
Sent	PersonnelClearanceCases	PSQSentDate		
Level	PersonnelClearanceCases	PSQ_Levels_ID	Levels	Name
e-QIP Case #	PersonnelClearanceCases	EPSQCaseNum		
e-QIP Sent Date	PersonnelClearanceCases	EPSQSentDate		
Other application - Submitted	PersonnelClearanceCases	AppSubmitDate		
Received	PersonnelClearanceCases	ClearAppRecDate		
Pending Basis	PersonnelClearanceCases	OtherAppPending		

Denied	PersonnelClearance Cases	ClearDenyDate		
Terminated	PersonnelClearance Cases	ClearAppTermed		
Reviewer	PersonnelClearance Cases	Reviewer_ID	PersonnelReviewer	Reviewer
Other Application Pending	PersonnelClearance Cases	OtherAppPending		
Polygraph - Case#	PersonnelClearance Cases	PolyCaseNum		
Given By	PersonnelClearance Cases	PolyGivenBy		
Result	PersonnelClearance Cases	PolyResult		
Type	PersonnelClearance Cases	PolyGraphType_ID	PersonnelPolygraph Type	PolygraphType
Test Date	PersonnelClearance Cases	PolyDate		
Case #	PersonnelClearance Cases	PolyCaseNum2		
Given By	PersonnelClearance Cases	PolyGivenBy2		
Result	PersonnelClearance Cases	PolyResult2		
Type				
Test Date	PersonnelClearance Cases	PolyDate2		
Audit Trail				
No Query option for the Audit Trail				
Task List				

Task	PersonnelClearanceTaskSet	ClearanceTask_ID	PersonnelClearanceTasks	ClearanceTasks
Assigned	PersonnelClearanceTaskSet	DateAssigned		
Estimated Completion	PersonnelClearanceTaskSet	ExpectDate		
Completed	PersonnelClearanceTaskSet	Completed		
Sequence	PersonnelClearanceTaskSet	Sequence		
Days to complete	PersonnelClearanceTaskSet	Days2Do		
Remarks	PersonnelClearanceTaskSet	Remarks		
Remarks				
Remarks	PersonnelClearanceCases	Remarks		
Special Accesses Tab				
Special Accesses				
Special Access	PersonnelSAs	SA_ID	SA	SAName
Identified	PersonnelSAs	SA_Ident_Date		
Status	PersonnelSAs	SaStatus_ID	SAStatus	SAStatus
Facility				
Billet Number	PersonnelSAs	SA_Billet		
Billet Type				
Billet Title				
Submitted	PersonnelSAs	SA_Submit_Date		

Briefed	PersonnelSAs	SA_Brief_Date		
Next Brief	PersonnelSAs	NextBrief		
Granted	PersonnelSAs	SA_Grant_Date		
Rebriefed	PersonnelSAs	SA_Rebriefed_Date		
Debriefed	PersonnelSAs	SA_Denied_Date		
Denied	PersonnelSAs	DenyDate		
Contract				
Sponsor				
Special Access Tracking				
Date Sent	Personnel	PersonnelSATracking	DateSent	
Date Returned	Personnel	PersonnelSATracking	DateReturn	
Reviewer	Personnel	PersonnelSATracking	Reviewer	
Remarks	Personnel	PersonnelSATracking	Remarks	
Employment Tab				
Start Date	Personnel	StartDate		
End Date	Personnel	TerminationDate		
Exclusion Date	Personnel	ExclusionDate		
Employee Type	Personnel	Employee_ID	PersonnnelEmployeeType	EmployeeType
Rate	Personnel	ChargeRate		
From Facility	Personnel	From_Facility_ID	Facility	FacilityID

Employment Status	Personnel	EmployeeStatus_ID	PersonnnelEmployeeStatus	EmployeeStatus
Organization	Personnel	Organization		
Work Phone	Personnel	WorkPhone		
Supervisor	Personnel	Supervisor		
Supervisor ID	Personnel	Supervisor_ID		
Investigation Cost	Personnel	InvestCost		
Mailstop	Personnel	MailStop		
Beeper Number	Personnel	Beeper		
Beeper Serial #	Personnel	BeeperSN		
Charge #	Personnel	ChargeNum		
Type	Personnel	ConsultType		
Agreement Date	Personnel	ConsultDate		
Expiration	Personnel	ConsultExpireDate		
Personal Information				
Height - feet	Personnel	HeightFeet		
Height - inches	Personnel	HeightInches		
Weight	Personnel	Weight		
Hair	Personnel	Hair		
Eyes	Personnel	Eyes		
Gender	Personnel	Gender_ID	PersonnelGender	Gender
Birthdate	Personnel	Birthdate		
Birthplace	Personnel	Birthplace		

Country	Personnel	Country_ID	Country	Country
Marital Status	Personnel	MaritalSatus_ID	PersonnelMaritalStatus	MaritalStatus
Maiden Name	Personnel	MaidenName		
Alias	Personnel	Alias		
Next of Kin Name	Personnel	KinName		
Next of Kin Phone	Personnel	KinPhone		
Relation	Personnel	KinRelation		
Driver's License #	Personnel	LicenseNumber		
Suffix	Personnel	SuffixName		
Passport #	Personnel	PassportNum		
City	Personnel	PassportCity		
State	Personnel	PassportSate		
Country	Personnel	Country_ID	Country	Country
Issued	Personnel	PassportIssued		
Expires	Personnel	PassportExpires		
Address 1	Personnel	HomeAddress1		
Address 2	Personnel	HomeAddress2		
City	Personnel	HomeCity		
State	Personnel	HomeState		
ZIP	Personnel	HomeZip		
Home Phone	Personnel	HomePhone		
Citizenship Tab				

U.S. Citizen	Personnel	USCitizen		
DualCitizenship	Personnel	CitizenCase		
U.S. Person	Personnel	CitizenCase		
Foreign Person	Personnel	CitizenCase		
Country of Citizenship	Personnel	Citizenship1_Country_ID	Country	
Verification	Personnel	CitizenVerify1_ID	CitizenshipVerification	
Passport #	Personnel	PassportNum		
Issued	Personnel	PassportIssued		
Passport Country	Personnel	Passport1_Country_ID	Country	Country
Passport State	Personnel	PassportState		
Passport City	Personnel	PassportCity		
Expires	Personnel	PassportExpires		
2nd Country of Citizenship	Personnel	Citizenship2_Country_ID	Country	
Verification	Personnel	CitizenVerify2_ID	CitizenshipVerification	
Passport #	Personnel	CitizenVerify2_ID	CitizenshipVerification	
Issued	Personnel	PassportIssued2		
Passport Country	Personnel	Passport2_Country_ID	Country	Country
Passport State	Personnel	PassportState2		
Passport City	Personnel	PassportCity2		
Expires	Personnel	PassportExpires2		

Alien lawfully admitted to U.S. permanent residency under Immigration and Naturalization Act	Personnel	USPersonCase		
Temporary resident legalized under Immigration Reform and Control Act	Personnel	USPersonCase		
Alien requested and granted political asylum status or admitted as refugee	Personnel	USPersonCase		
Evidence of Residency or Asylumn	Personnel	AssylumStatus_ID	PersonnelAssylumStatus	AssylumStatus
Date	Personnel	USPRDate		
Foreign Govt Represented	Personnel	Foreign_Country_ID	Country	Country
International Entity Represented	Personnel	IntlAgencyRep		
Agency or Division of Entity or Govt	Personnel	IntlDivision		
Badges Tab				
Badge Number	PersonnelBadges	BadgeNumber		
Clearance	PersonnelBadges	Levels_ID	Levels	Name
Issued By	PersonnelBadges	IssuedBy		
Issued Date	PersonnelBadges	Issued		
Expiration Date	PersonnelBadges	Expiration		
Returned Date	PersonnelBadges	Returned		

Reason	PersonnelBadges	Reason		
Training Tab				
Course ID	PersonnelTraining	Course_ID	Courses	CourseID
Course Name	PersonnelTraining	Course_ID	Courses	Name
Status	PersonnelTraining	TrainingStatus_ID	PersonnelTrainingStatus	TrainingStatus
Assigned	PersonnelTraining	DateAssigned		
Started	PersonnelTraining	DateStarted		
Completed	PersonnelTraining	DateCompleted		
Remarks	PersonnelTraining	Remarks		
Contacts Tab				
ID	PersonnelContacts	ContactID		
Name	PersonnelContacts	Name		
Relation	PersonnelContacts	Relation		
Phone	PersonnelContacts	Phone		
Contracts/Vehicles Tab				
Contracts				
Contract	PersonnelContracts	Contract_ID	Contract	ContractID
Date of Access	PersonnelContracts	DateofAccess		
Description	PersonnelContracts	Contract_ID	Contract	Description
Vehicles				

Date	PersonnelVehicles	Vehicle_Date		
License	PersonnelVehicles	License		
State	PersonnelVehicles	State		
Year	PersonnelVehicles	Year		
Color				
Decal #	PersonnelVehicles	DecalNum		
Vehicle Type	PersonnelVehicles	Vehicle_Type		
Vehicle Make	PersonnelVehicles	Make		
Vehicle Model	PersonnelVehicles	Model		
Status	PersonnelVehicles	Status		
Assigned Parking	PersonnelVehicles	Assign_Park		
Insurer	PersonnelVehicles	Insurer		
Amount	PersonnelVehicles	Insurer_Amount		
Expires	PersonnelVehicles	Insure_Expire		
Remarks	PersonnelVehicles	Remarks		
Military Tab				
Grade/Rank/Rate	Personnel	GradeRankRate		
Designator/NEC	Personnel	DesignatorNEC		
Lineal Number	Personnel	LinealNumber		
Branch	Personnel	Branch_ID	PersonnelMilitaryBranch	MilitaryBranch
Current UIC	Personnel	UICCurrent		
Current Command	Personnel	UICCurrentName		

Received Date	Personnel	UICReceivedDate		
Date of Rank	Personnel	DateofRank		
Warfare Specialty	Personnel	WarSpecialty		
Spouse Name	Personnel	NameofSpouse		
Projected Rotation Date	Personnel	ProjectedRotationDate		
Ultimate UIC	Personnel	UICCurrent		
Ultimate Command	Personnel	UICCurrentName		
Estimated Arrival Date	Personnel	UICUltimateEstDateArrivalDate		
Foreign Travel/Contracts Tab				
Foreign Travel				
Date Reported at Security	PersonnelForeignTavel	DateReportAtSecurity		
Sponsor	PersonnelForeignTavel	Sponsor		
From	PersonnelForeignTavel	From		
To	PersonnelForeignTavel	To		
Foreign Carrier Used	PersonnelForeignTavel	ForeignCarrier		
Pre-travel Brief	PersonnelForeignTavel	PreTravelBrief		
Travel Debrief	PersonnelForeignTavel	TravelDebrief		

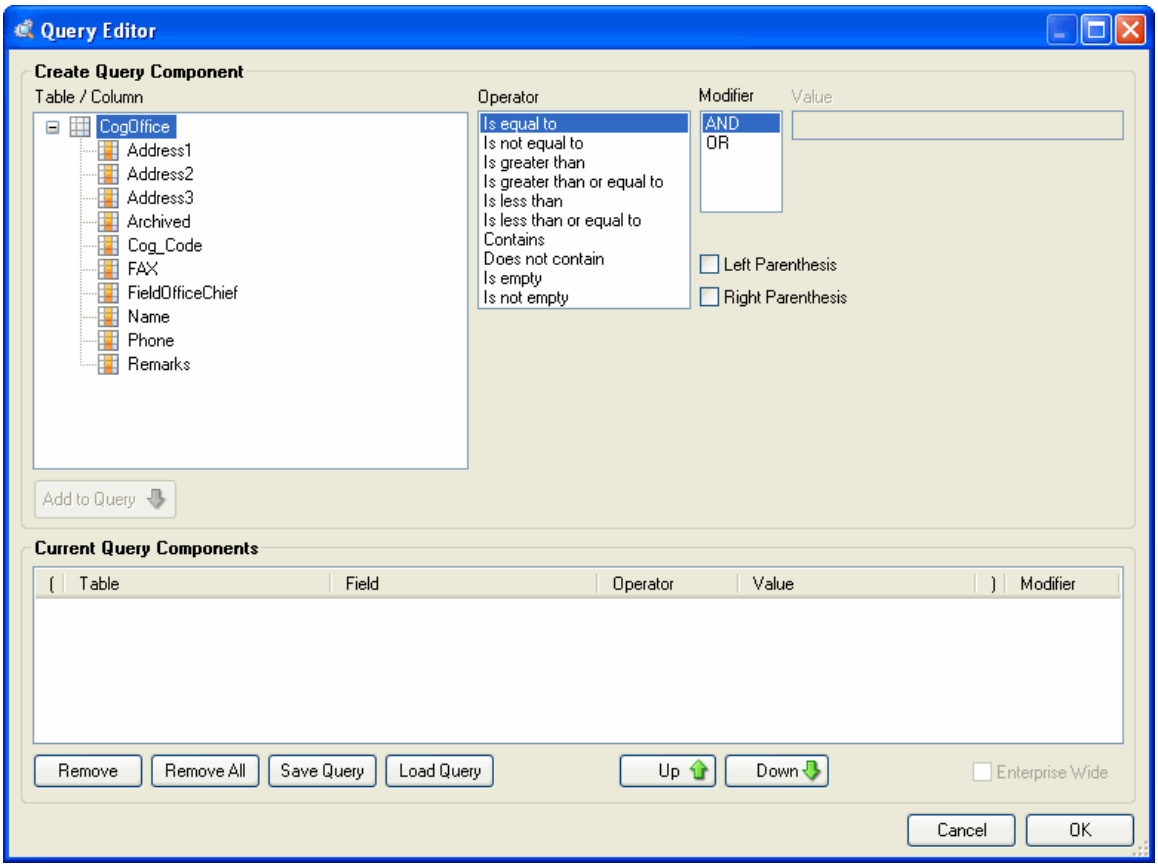
Purpose	PersonnelForeignTavel	Purpose		
Foreign Contact Info				
Date Reported	PersonnelForeignContacts	ReportedtoDSS		
Name	PersonnelForeignContacts	Name		
Company	PersonnelForeignContacts	Company		
Position	PersonnelForeignContacts	Position		
Nationality #1				
Nationality #2				
E-mail Address	PersonnelForeignContacts	EmailAddress		
Remarks	PersonnelForeignContacts	Remarks		
Contact Dates				
Location	PersonnelForeignContactDates	Location		
Contact Type				
Date	PersonnelForeignContactDates	ContactDate		
Remarks	PersonnelForeignContactDates	Remarks		
Remarks Tab				
Remarks	Personnel	Remarks		

HR Activity Tab				
Activity Code				
Description				
Effective Date				
Remarks				
Changed By				

Cognizant Offices - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Cogizant Offices

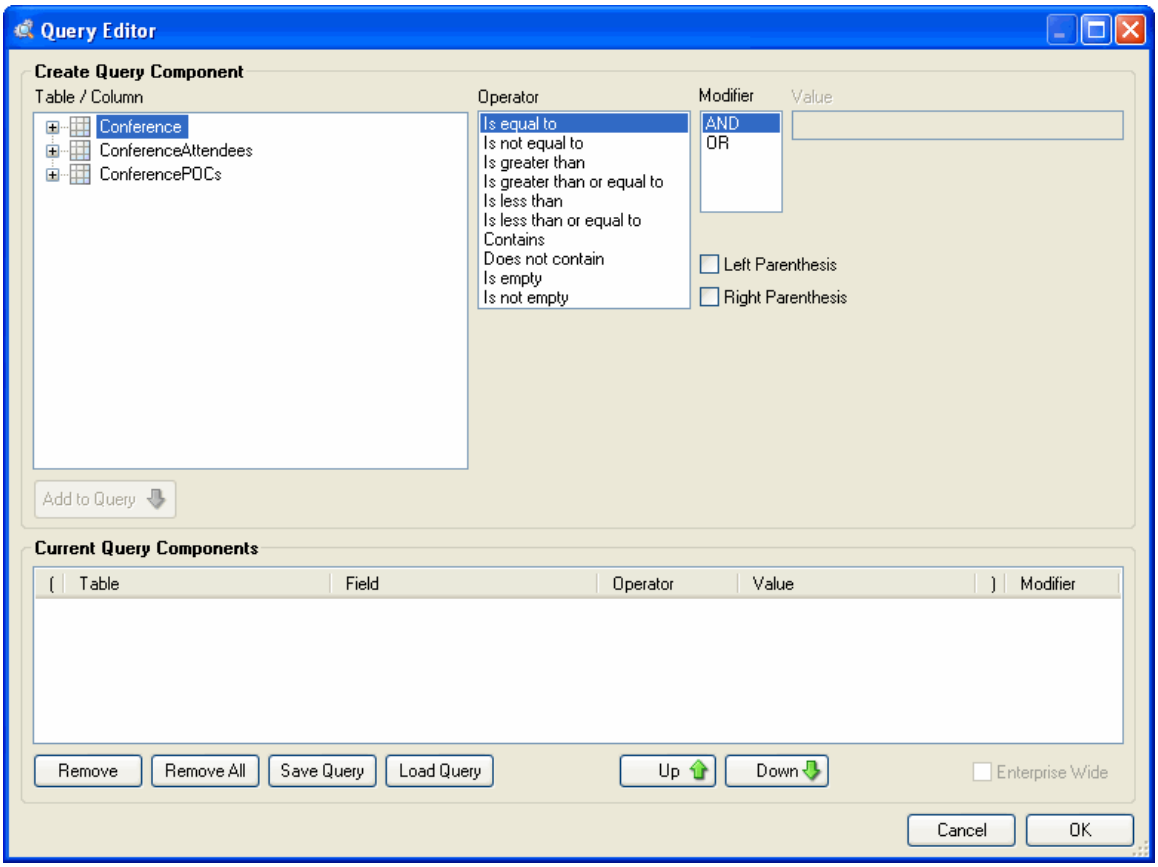
The table below lists fields in the Cognizant Offices module. The subsequent columns list where the field can be found in the Query Editor.

Cognizant Code	CogOffice	Cog_Code		
Office Name	CogOffice	Name		
Phone	CogOffice	Phone		
FAX	CogOffice	FAX		
Field Office Chief	CogOffice	FieldOfficeChief		
Address Line 1	CogOffice	Address1		
Address Line 2	CogOffice	Address2		
Address Line 3	CogOffice	Address3		
Remarks	CogOffice	Remarks		

Conferences and Meetings - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Conferences and Meetings

The table below lists fields in the Conferences and Meetings module. The subsequent columns list where the field can be found in the Query Editor.

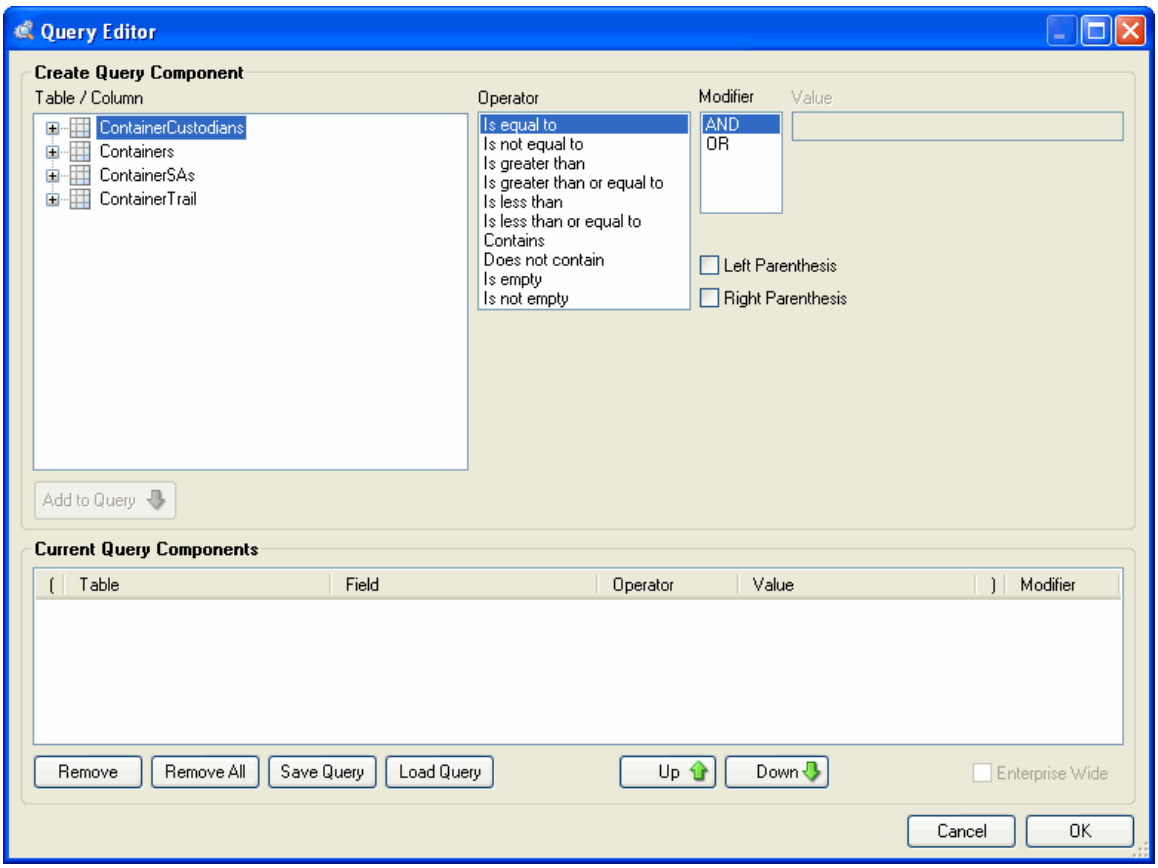
Home Tab				
Conference Name	Conference	ConferenceName		
Conference Location	Conference	ConferenceLocation_ID	ConferenceLocation	ConferenceLocation
Facility	Conference	Facility_ID	Facility	FacilityID
Data Group	Conference	UserGroup_ID	UserGroups	GroupName
From	Conference	FromDate		
To	Conference	ToDate		
Description	Conference	Description		
Attendees (Count)				
Classification Level	Conference	ClassificationLevel_ID	Levels	Name
POC Name (Personnel)	Conference	POC_Personnel_ID	Personnel	PersonnelID
POC Name (Visitor)	Conference	VisitAuthorizationVisitors	VisitAuthorizationVisitors	VisitorID

Attendees Tab				
Attendee Name (Personnel)	ConferenceAttendees	Personnel_ID	Personnel	LastName/FirstName/MiddleName
Attendee Name (Visitor)	ConferenceAttendees	VisitAuthorizationVisitor_ID	VisitAuthorizationVisitors	LastName/FirstName/MiddleName
Attendee ID (Personnel)	ConferenceAttendees	Personnel_ID	Personnel	PersonnelID
Attendee ID (Visitor)	ConferenceAttendees	VisitAuthorizationVisitor_ID	VisitAuthorizationVisitors	VisitorID
Facility ID	ConferenceAttendees	Facility_ID	Facility	FacilityID
Barcode	ConferenceAttendees	Barcode		
Non-Citizen Type				
Highest Level	ConferenceAttendees	Highest_Level_ID	Levels	Name
Ready to Register	ConferenceAttendees	ReadytoRegister		
US Citizen (Personnel)	ConferenceAttendees	Personnel_ID	Personnel	USCitizen
US Citizen (Visitor)	ConferenceAttendees	VisitAuthorizationVisitor_ID	VisitAuthorizationVisitors	USCitizen
Scan Date	ConferenceAttendees	ScanDate		
Remarks Tab				
Remarks Tab	Conference	Remarks		

Containers - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.

Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.
Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

The table below lists fields in the Containers module. The subsequent columns list where the field can be found in the Query Editor.

Containers

Home Tab				
ID	Containers	ContainerID		
Accountability#	Containers	AccountNumber		
Barcode	Containers	Barcode		
StorageLevel	Containers	Storage_Level_ID	Levels	Name
Location	Containers	ContainerLocation_ID	ContainerLocation	ContainerLocation
PrimeCustodian	ContainerTrail	PrimeCustodianID		
FacilityID	Containers	Facility_ID	Facility	FacilityID
Data Group	Containers	UserGroup_ID	UserGroups	GroupName
Combination Changed	Containers	ComboChangeDate		
Combination Expires	Containers	ComboExpirationDate		
Type	Containers	ContainerType_ID	ContainerType	ContainerType

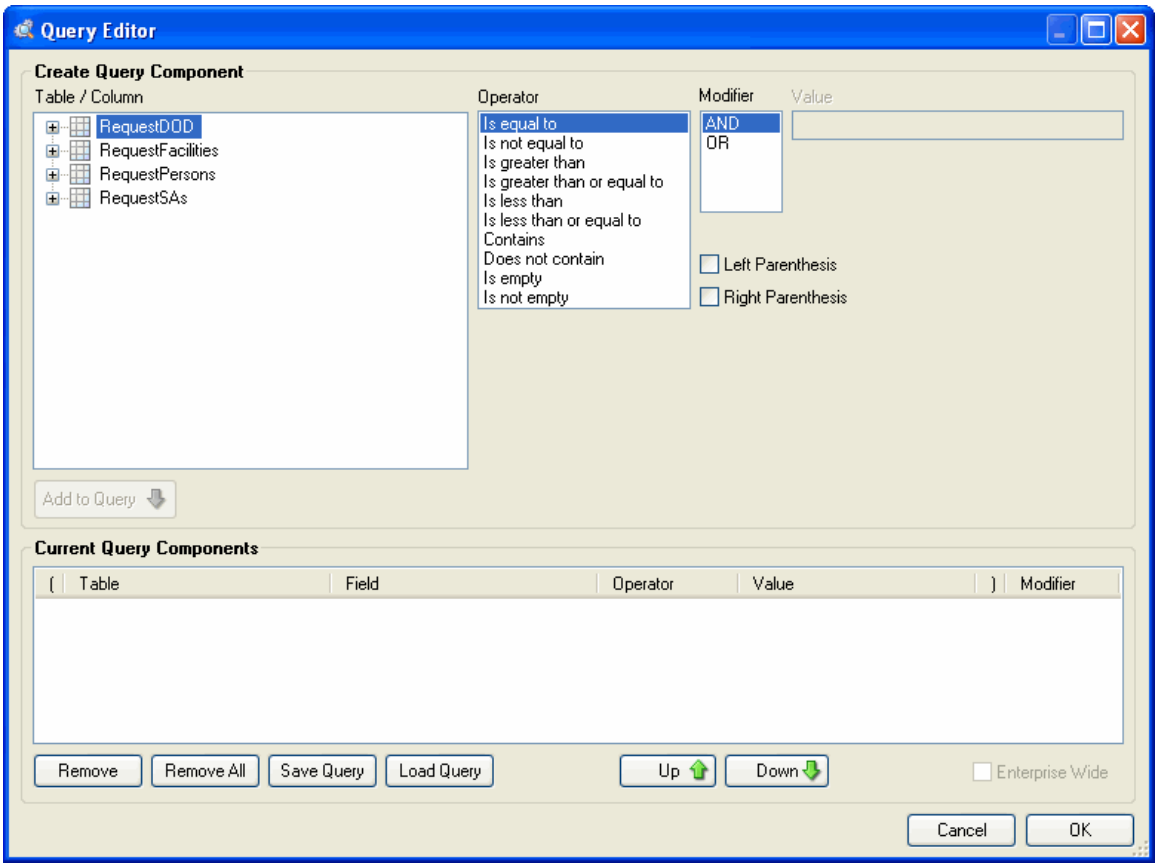
Maker	Containers	Maker		
Serial Number	Containers	SeralNumber		
Model	Containers	Model		
Rated Level	Containers	Rated_Level_ID	Levels	Name
Multiple Drawer	Containers	MulipleDrawer		
Drawers	Containers	DrawerCount		
Inactive	Containers	Inactive		
Alarmed	Containers	Alarmed		
Special Accesses	ContainerSAs	SA_ID	SA	SAName
Personnel Accesses Tab				
Name	ContainerCustodians	Personnel_ID	Personnel	LastName
ID	ContainerCustodians	Personnel_ID	Personnel	PersonnelID
Denied	ContainerCustodians	AccessDenied		
Granted	ContainerCustodians	AccessGranted		
Access Type	ContainerCustodians	ContainerAccessType_ID	ContainerAccessType	ContainerAccessType
Audit Trail Tab				
Action Date and Time	ContainerTrail	ActionDate		
Combo Changed Date	ContainerTrail	ComboChanged		

Next Combo Changed Date	ContainerTrail	NextComboChanged		
StorageLevel	ContainerTrail	Store_Level_ID	Name	
Location	ContainerTrail	ContainerLocation_ID	ContainerLocation	ContainerLocation
Custodian ID	ContainerTrail	PrimeCustodianID		
Custodian Name	ContainerTrail	PrimeCustodianName		
Note	ContainerTrail	Note		
Remarks Tab				
Remarks	Containers	Remarks		

DoD Outgoing Request - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

DoD Outgoing Requests

The table below lists fields in the DoD Outgoing Requests module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
Request Number	RequestDoD	RequestNumber		
Department	RequestDoD	Department_ID	Department	Department
Task	RequestDoD	ContractTask		
Anticipated Classification of Topic	RequestDoD	Levels_ID	Levels	Name
From Facility ID	RequestDoD	Host_Facility_ID	Facility	FacilityID
From Facility Name	RequestDoD	Host_Facility_ID	Facility	FacilityName
Manager Phone				
Manager Fax				
Security Offier	RequestDoD	Officer_Personnel_ID	Personnel	PersonnelID
Contract ID	RequestDoD	Contract_ID	Contract	ContractID
Data Group	RequestDoD	UserGroup_ID	UserGroups	GroupName
Valid From	RequestDoD	FromDate		
Valid To	RequestDoD	ToDate		

Date Sent	RequestDoD	SentDate		
Contractual	RequestDoD	Contractual		
Purpose	RequestDoD	Purpose		
Send To Facility Tab				
Facility ID				
Information Address				
Facility Name				
Address1				
Address2				
Address3				
Address4				
Contact Name				
Phone				
Fax				
Remarks				
Endorsements Tab				
SF 312 Executed	RequestDoD	SP31Executed		
Cognizant Office Name				
Cog Address 1	RequestDoD	Endorsement_Cognizant_ID	CogOffice	Address1
Cog Address 2	RequestDoD	Endorsement_Cognizant_ID	CogOffice	Address2

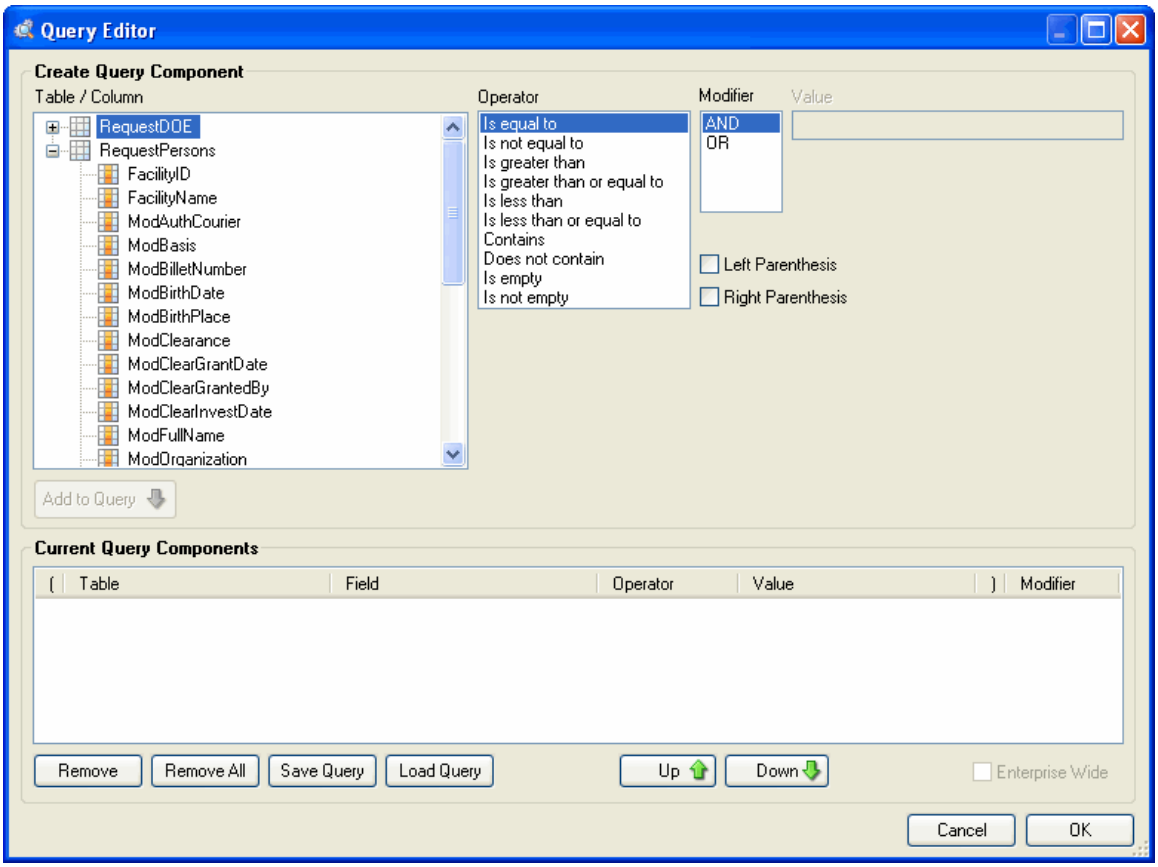
Cog Address 3	RequestDoD	Endorsement_Cognizant_ID	CogOffice	Address3
Cog Address 4	RequestDoD	Endorsement_Cognizant_ID	CogOffice	Address4
Other Facility Name				
Other Fac Address 1	RequestDoD	Endorsement_FacilityAddress_ID	FacilityAddress	Line1
Other Fac Address 2	RequestDoD	Endorsement_FacilityAddress_ID	FacilityAddress	Line2
Other Fac Address 3	RequestDoD	Endorsement_FacilityAddress_ID	FacilityAddress	Line3
Other Fac Address 4	RequestDoD	Endorsement_FacilityAddress_ID	FacilityAddress	Line4
Contract Name	RequestDoD	Contract_ID	Contract	ContractName
International Tab				
Govt Initiative	RequestDoD	GovtInitiated		
Host Initiative	RequestDoD	HostInitiated		
Pertinence	RequestDoD	Pertinence		
Anticipated Classification of Topic	RequestDoD	Levels_ID	Levels	Name
Special Accesses / Status Tab				
Special Accesses	RequestDoD	SA_ID	SA	SAName
Date Initiated	RequestDoD	DateCreated		
Requester Name	RequestDoD	RequesterName		
Requester Phone	RequestDoD	RequesterPhone		

Requester Email	RequestDoD	RequesterEmail		
Status	RequestDoD	RequestStatus_ID	RequestStatus	Name
Status Date	RequestDoD	StatusDate		
Fax Country Code	RequestDoD	SentToFaxCountryCode		
Fax Area or Routing Code	RequestDoD	SentToFaxAreaCode		
Fax Local Number	RequestDoD	SentToFaxLocalNumber		
Remarks Tab				
Remarks	RequestDoD	Remarks		

DoE Outgoing Requests - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

DoE Outgoing Requests

The table below lists fields in the DoE Outgoing Requests module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
Request #	RequestDoD	RequestNumber		
Data Group	RequestDoD	UserGroup_ID	UserGroups	GroupName
To	RequestDoD	RequestTo		
From - Line1	RequestDoD	RequestFrom		
From - Line2	RequestDoD	RequestFrom2		
From - Line3	RequestDoD	RequestFrom3		
Facility # 1 to be visited				
Facility # 2 to be visited				
DOE Security Official	RequestDoD	Official		
Date	RequestDoD	SentDate		
Prepared By	RequestDoD	RequestPrepare		
Symbol				
Telephone #	RequestDoD	Phone		

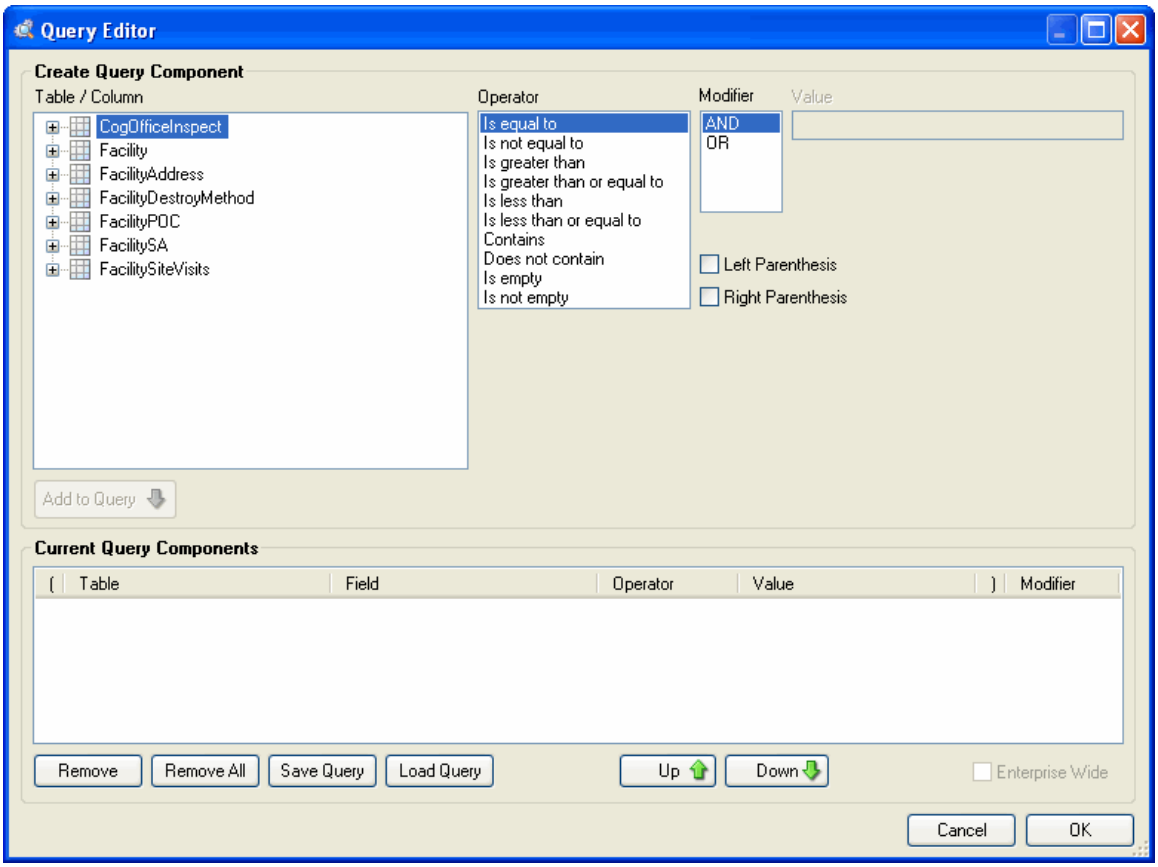
FTS	RequestDoD	FTS		
Valid From 1	RequestDoD	ValidFrom1		
Valid From 2	RequestDoD	ValidfFrom2		
Valid To 1	RequestDoD	ValidTo1		
Valid To 2	RequestDoD	ValidTo2		
Purpose Tab				
For Purpose of	RequestDoD	Purpose		
Confer with the following Persons	RequestDoD	Confer		
Restricted Data	RequestDoD	RDAccess		
Other Classified Info	RequestDoD	OtherAccess		
Specific Info Which Access is Requested	RequestDoD	Info		
Prior Arrangements Have (Not) Been Made as Follows	RequestDoD	Arrange		
Certification Tab				
CNWDI	RequestDoD	CNWDI		
Name and title, Requesting DoD Official	RequestDoD	RequestName		
Name and title, Requesting DoD Official	RequestDoD	RequestTitle		
Title, Authorizing DoD Official	RequestDoD	AuthTitle		

Title	RequestDoD	Title		
Requesting DOE or Other Govt Agencies	RequestDoD	Agency		
Approval is granted with limitaions indicated below:	RequestDoD	Approval		
Manager of Operations or Headquarters Division Directory	RequestDoD	Manager		
Personnel Tab				
No Query option for the Personnel Tab				

Host Facilities - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Host Facilities

The table below lists each field in the Host Facilities module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
ID	Facility	FacilityID		
Name	Facility	FacilityName		
Type	Facility	FacilityType		
Inactive	Facility	Inactive		
Govt Facility	Facility	IsGovtFacility		
International	Facility	International		
Cognizant Office	Facility	CogOffice_ID	CogOffice	Cog_Code
Convenience Code	Facility	ConvienceCode		
Data Group	Facility	UserGroup_ID	UserGroups	GroupName
Address Line #1	FacilityAddress	Line1		
Address Line #2	FacilityAddress	Line2		
Address Line #3	FacilityAddress	Line3		
Address Line #4	FacilityAddress	Line4		
Address Phone	FacilityAddress	Phone		

Contact Name				
Contact Telephone				
FAX				
Secure Phone	FacilityAddress	SecurePhone		
Emergency Phone	FacilityAddress	EmergencyPhone		
Facility Security Officer - Name	FacilityAddress	FacManager_ID	Personnel	FirstName/LastName/MiddleName
Facility Security Officer - Phone	Facility	FSOPhone		
Facility Security Officer - e-mail	Facility	FSOEmail		
Clearance Level	Facility	Clearance_Level_ID	Levels	Name
Storage Level	Facility	StorageLevel_ID	Levels	Name
Granted	Facility	ClearanceGrantDate		
SPP Update	Facility	SPPDate		
FOCI	Facility	FOCI		
Next Check	Facility	NextVerify		
Other Addresses Tab				
Address Type	FacilityAddress	PrimaryAddress		
Header	FacilityAddress	Header		
Address Line #1	FacilityAddress	Line1		
Address Line #2	FacilityAddress	Line2		
Address Line #3	FacilityAddress	Line3		
Address Line #4	FacilityAddress	Line4		

Footer	FacilityAddress	Footer		
Fax #1	FacilityAddress	Fax1		
Fax #2	FacilityAddress	Fax2		
Fax #3	FacilityAddress	Fax3		
Secure Phone	FacilityAddress	SecurePhone		
Emergency Phone	FacilityAddress	EmergencyPhone		
Address Phone	FacilityAddress	Phone		
Contact	FacilityAddress	Contact_Name		
Position	FacilityAddress	Contact_Position		
Phone	FacilityAddress	Contact_Phone		
Notes	FacilityAddress	Contact_Notes		
CogOffices Tab				
CogOffice Name	Facility	CogOffice_ID	CogOffice	Name
Address 1	Facility	CogOffice_ID	CogOffice	Address1
Address 2	Facility	CogOffice_ID	CogOffice	Address2
Address 3	Facility	CogOffice_ID	CogOffice	Address3
Phone	Facility	CogOffice_ID	CogOffice	Phone
FAX	Facility	CogOffice_ID	CogOffice	FAX
CogInspections Tab				
Cognizant Field Office	Facility	CogFieldOffice_ID	CogOffice	Cog_Code

Cognizant Resident Office	Facility	CogResidentOffice_ID	CogOffice	Remarks
Cog Office Rep	Facility	CogRep		
Cog Inspection Date	Facility	CpInspDate		
Cog Office Rep	Facility	LastInspectDate		
Rating	Facility	LastInspectBy		
Remarks	Facility	LastCogVisitRem		
Next Facility Inspection	Facility	NextCogInspect		
Internal Inspections Tab				
Inspected By	FacilitySiteVisits	InspectorName		
Date	FacilitySiteVisits	SiteVisitDate		
Remarks	FacilitySiteVisits	Result		
Access Control Tab				
Employees	Facility	EmployeeBadging		
Visitors	Facility	VisitorBadging		
Vendors	Facility	VendorBadging		
Temporary Help	Facility	TempBadging		
Contractors	Facility	ContractBadging		
Accountability System				
Visitor Control	Facility	VisitorControl_ID	VisitorControl	VisitorControl

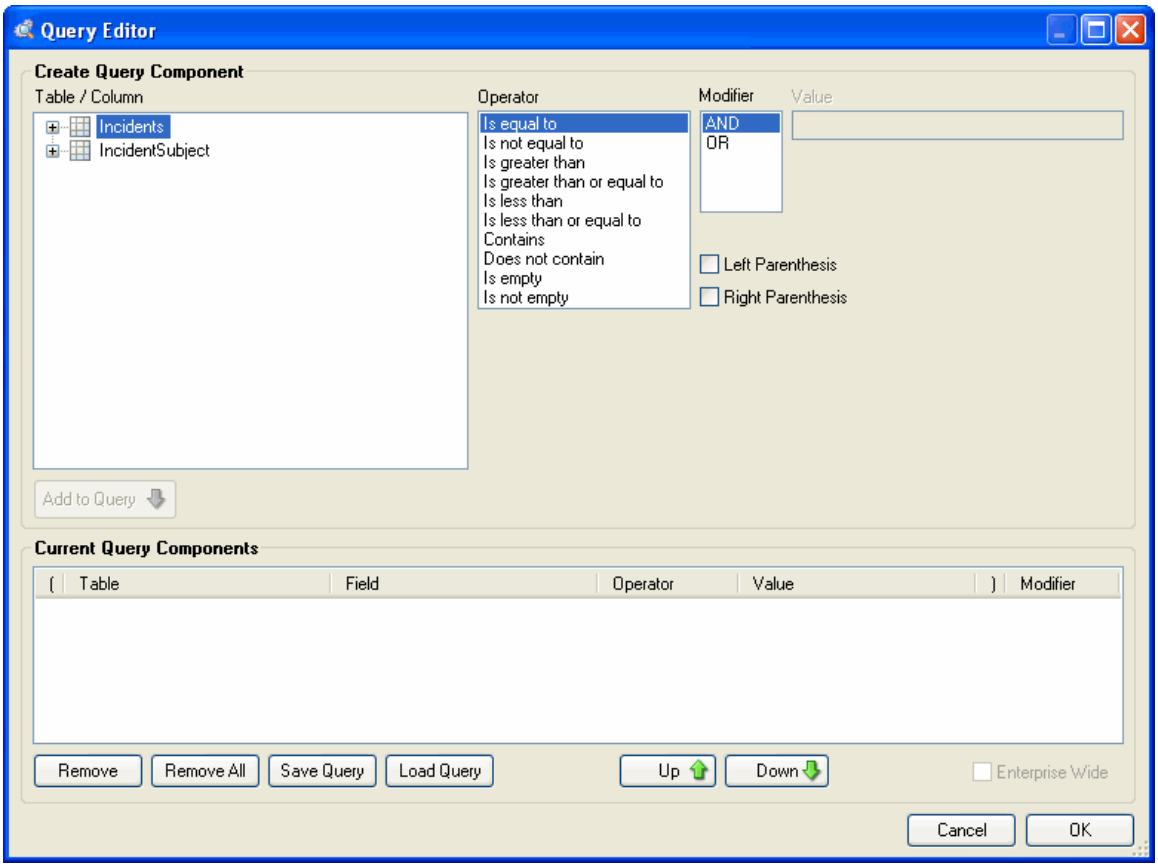
Approved by DSS for FedEx	Facility	DSSFedexOK		
Destruction Method				
Classified AIS	Facility	ClassifiedAIS		
SAP/SAR	Facility	SAPSAR		
Protected Areas	Facility	ProtectedAreas		
NRC	Facility	NRC		
STU III	Facility	STUIII		
Perimeter Control	Facility	PerimControl		
DOE FCL	Facility	DOEFCL		
Closed Areas	Facility	ClosedAreas		
Special Accesses	Facility	SA_ID	SA	SAName
Key Security Personnel Tab				
Facility Security Officer Name	FacilityAddress	FacManager_ID	Personnel	FirstName/LastName/MiddleName
Start Date	Facility	FSOStartDate		
E-mail	Facility	FSOEmail		
Phone	Facility	FSOPhone		
FSO Training				
Course ID				
Course Status				
Course Name				

Facility Manager Name	Facility	FacManager		
Phone	Facility	FacManagerPhone		
Staff Member Name	Facility	StatMemName		
Phone	Facility	StatMemPhone		
Key Security Personnel Report Date	Facility	KSPDate		
Awards Tab				
Awards	Facility	Awards		
Awards - notes	Facility	AwardNotes		
Remarks Tab				
Remarks	Facility	Remarks		

Incidents - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Incidents

The table below lists fields in the Incidents module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
Incident ID	Incidents	IncidentID		
Incident Type	Incidents	IncidentType_ID	IncidentType	IncidentType
Incident Date	Incidents	IncidentDate		
Classification	Incidents	Classification_Level_ID	Levels	Name
Department	Incidents	Department_ID	Department	Department
Location	Incidents	IncidentLocation		
Incident Facility	Incidents	Facility_ID	Facility	FacilityID
Subjects	IncidentSubject	Personnel_ID	Personnel	PersonnelID
Subject Type	IncidentSubject	IncidentSubjectType	IncidentSubjectType	
Subject Remarks	IncidentSubject	Remarks		
Cause	Incidents	Cause		
Compromise	Incidents	IncidentCompromise_ID	IncidentCompromise	IncidentCompromise
Damage	Incidents	IncidentDamage_ID	IncidentDamage	IncidentDamage
Status	Incidents	IncidentStatus_ID	IncidentStatus	IncidentStatus

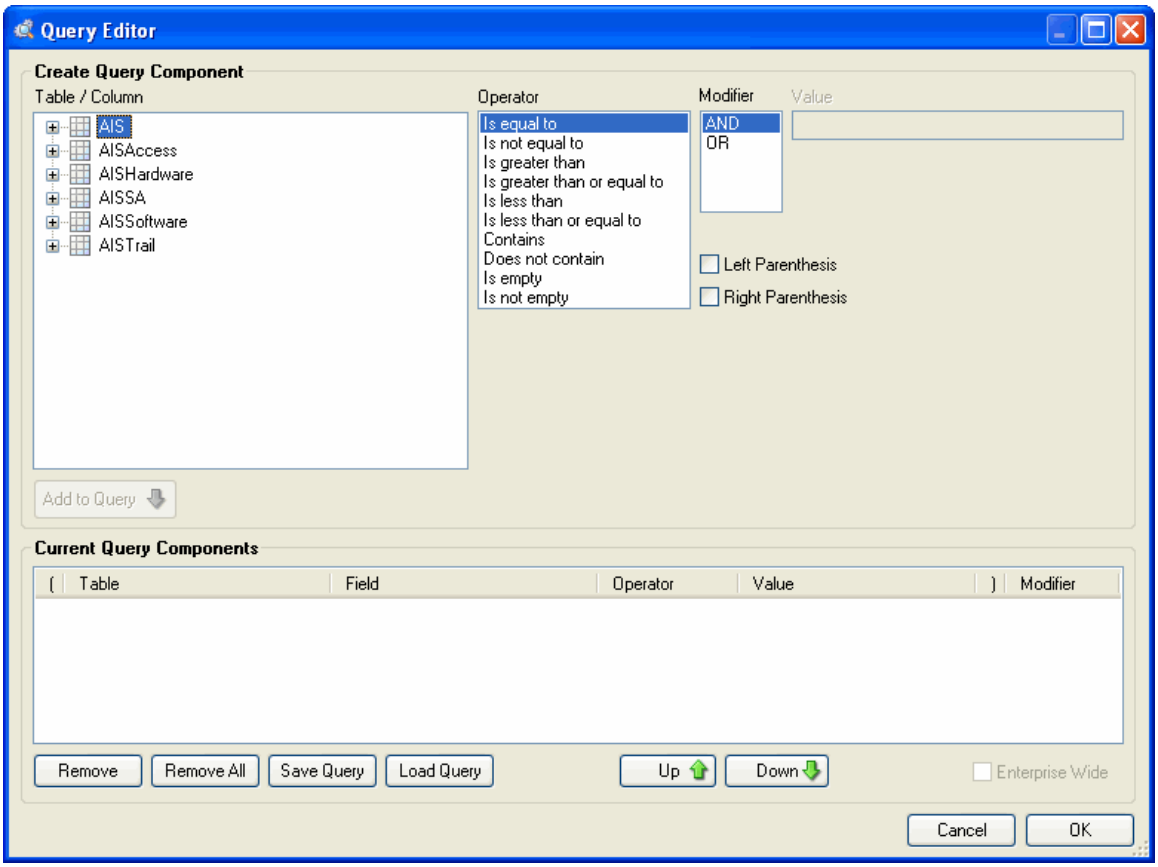
Dollar Loss	Incidents	DollarLoss		
Police File #	Incidents	PoliceFileNumber		
Police Notified	Incidents	PoliceNotify		
Open Date	Incidents	OpenDate		
Report Date	Incidents	ReportDate		
Close Date	Incidents	CloseDate		
Data Group	Incidents	UserGroup_ID	UserGroups	GroupName
Reported By (Personnel)	Incidents	ReportedBy_Personnel_ID	Personnel	PersonnelID
Reported By (Visitor)	Incidents	ReportedBy_Visitor_ID	VisitAuthorizationVisitors	VisitorID
Facility	Incidents	Facility		
Self Reported	Incidents	SelfReported		
Special Access	Incidents	SA_ID	SA	SAName
Action Tab				
Next Status Date	Incidents	NextStatusDate		
Action Date	Incidents	ActionDate		
Estimated Date for Final Report	Incidents	EstimatedFinalReportDate		
Next Status	Incidents	Next_IncidentStatus_ID	IncidentStatus	IncidentStatus
Action	Incidents	IncidentAction_ID	IncidentAction	IncidentAction
Cognizant Office Notified	Incidents	CogNotified		
Notify List	Incidents	NotifyList		

Description Tab				
Description	Incidents	Description		
Personnel Involved	Incidents	PersonsInvolved		
Findings Tab				
Findings				

IS - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

IS

The table below lists fields in the IS module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
AIS ID	AIS	AISID		
Barcode	AIS	Barcode		
FacilityID	AIS	Facility_ID	Facility	FacilityID
ParentID	AIS	AISParentSystem_ID		
Deactivate Date	AIS	DeactivateDate		
Location	AIS	AISLocation_ID	AISLocation	AISLocation
System Category	AIS	AISSystemCategory	AISSystemCategory	AISSystemCategory
Status	AIS	AISOperationalStatus_ID	AISOperationalStatus	AISOperationalStatus
AIS Mode	AIS	AISMode_ID	AISMode	AISMode
Custodian ID (Personnel)	AIS	Custodian_Personnel_ID	Personnel	PersonnelID
Custodian ID (Visitorl)	AIS	Custodian_Visitor_ID	VisitAuthorizationVisitors	VisitorID
When Processing	AIS	Process_Level_ID	Levels	Name

When Not Processing	AIS	NoProcess_Level_ID	Levels	Name
IP Address	AIS	IPAddress		
Next Inspect	AIS	NextInsepctDate		
Memo	AIS	Memo		
Responsible Ctr.	AIS	AISResponsibleCenter_ID	AISResponsibleCenter	AISResponsibleCenter
Inspect Rating	AIS	InspecitionRating_ID	InspectionRating	InspectionRating
Inspected Date	AIS	InspectDate		
Contigency Plan	AIS	ContingencyPlanDate		
Accredidation	AIS	AccredDate		
Risk Assessment	AIS	RiskAssessDate		
System Specific	AIS	SPPSysSpec		
SPP Date	AIS	SPPDate		
Submit Date	AIS	SPPSubmitDate		
Approve Date	AIS	SPPApproveDate		
Next Review	AIS	NextSPPReview		
Emergency Phone	AIS	EmergencyPhone		
Data Group	AIS	UserGroup_ID	UserGroups	GroupName
Firewall Hardware	AIS	AISFirewallHardware_ID	AISFirewallHardware	AISFirewallHardware
Firewall Software	AIS	AISSoftware_ID	AISSoftware	AISSoftware
Hardware Tab				

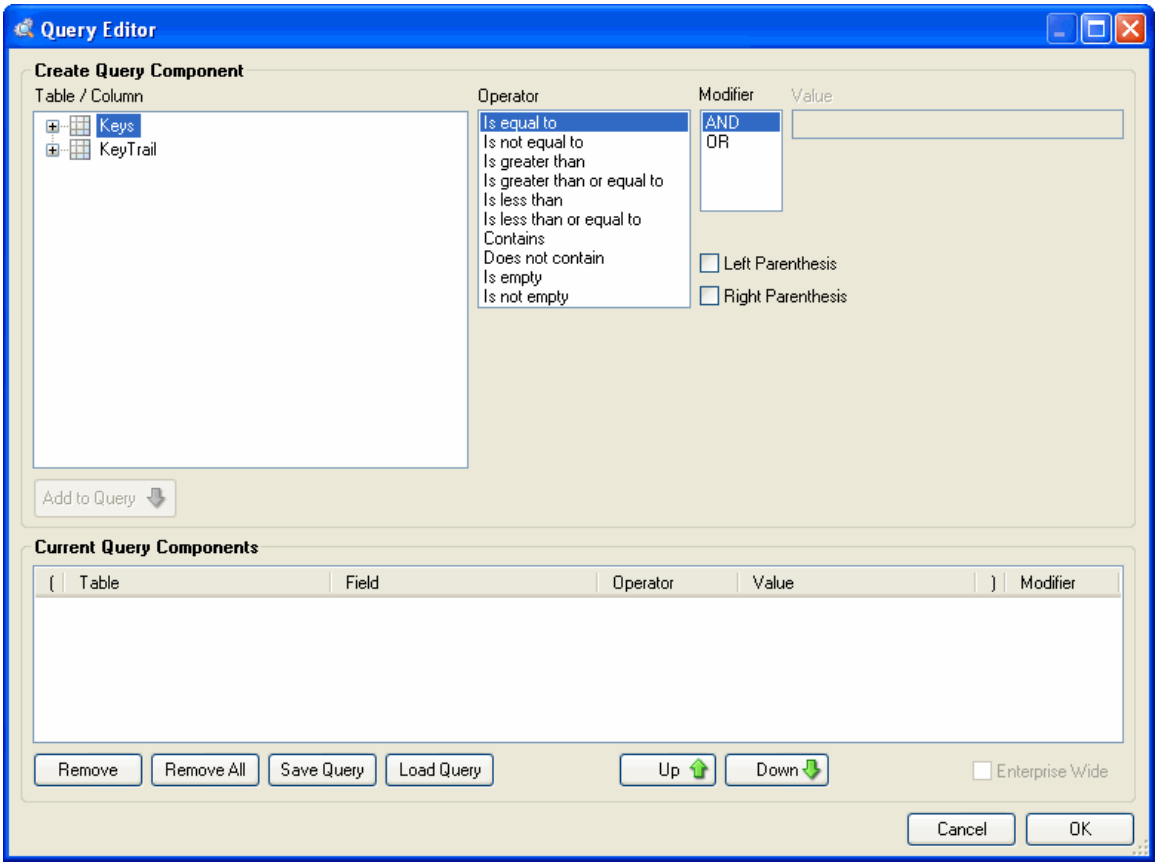
Hardware Type	AISHardware	AISHardwareType_ID	AISHardwareType	AISHardwareType
Hardware Model	AISHardware	Model		
Serial Number	AISHardware	SerialNumber		
Barcode	AISHardware	Barcode		
Classification	AISHardware	Classification_Level_ID	Levels	Name
Last Inventory	AISHardware	LastInventory		
Date Sealed	AISHardware	Sealed		
Description	AISHardware	Description		
Software Tab				
Type	AISSoftware	AISSoftwareType_ID	AISSoftwareType	AISSoftwareType
Version	AISSoftware	SoftwareVersion		
Classification	AISSoftware	Classification_Level_ID	Levels	Name
Serial Number	AISSoftware	SerialNumber		
Resident	AISSoftware	Resident		
Access List				
ID	AISAccess	Personnel_ID	Personnel	PersonnelID
Granted	AISAccess	Granted		
Briefed	AISAccess	Briefed		
Trained	AISAccess	Trained		

Special Accesses Tab				
Special Access Type	AISSA	SA_ID	SA	SAName
Remarks Tab				
Remarks Tab	AIS	Remarks		

Keys - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.
Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Keys

The table below lists fields in the Keys module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
Base Key ID	Keys	BaseKeyID		
Key Copy Holder (Personnel)	Keys	KeyHolder_Personnel_ID	Personnel	PersonnelID

Key Copy Holder (Visitor)	Keys	KeyHolder_VisitAuthorizationVisitors_ID	VisitAuthorizationVisitors	VisitorID
Facility	Keys	Facility_ID	Facility	FacilityID
Data Group	Keys	UserGroup_ID	UserGroups	GroupName
Issued	Keys	IssuedDate		
Retrieved	Keys	RetrievedDate		
Status	Keys	KeyStatus_ID	KeyStatus	KeyStatus
Hook ID	Keys	KeyHook_ID	KeyHooks	KeyHookID
Key Ring	Keys	KeyRing_ID	KeyRings	KeyRIngID
Bitting	Keys	KeyBitting		
Copy #	Keys	KeyCopyNum		
Inactive	Keys	Inactive		
Original	Keys	Original		
Master	Keys	Master		
LockID				
Classification				
Custodian				
Location				
Status				
Hooks and Rings Tab				
Key Hook ID	Keys	KeyHook_ID	KeyHooks	KeyHookID
Building	Keys	KeyHook_ID	KeyHooks	Building
Room	Keys	KeyHook_ID	KeyHooks	Room

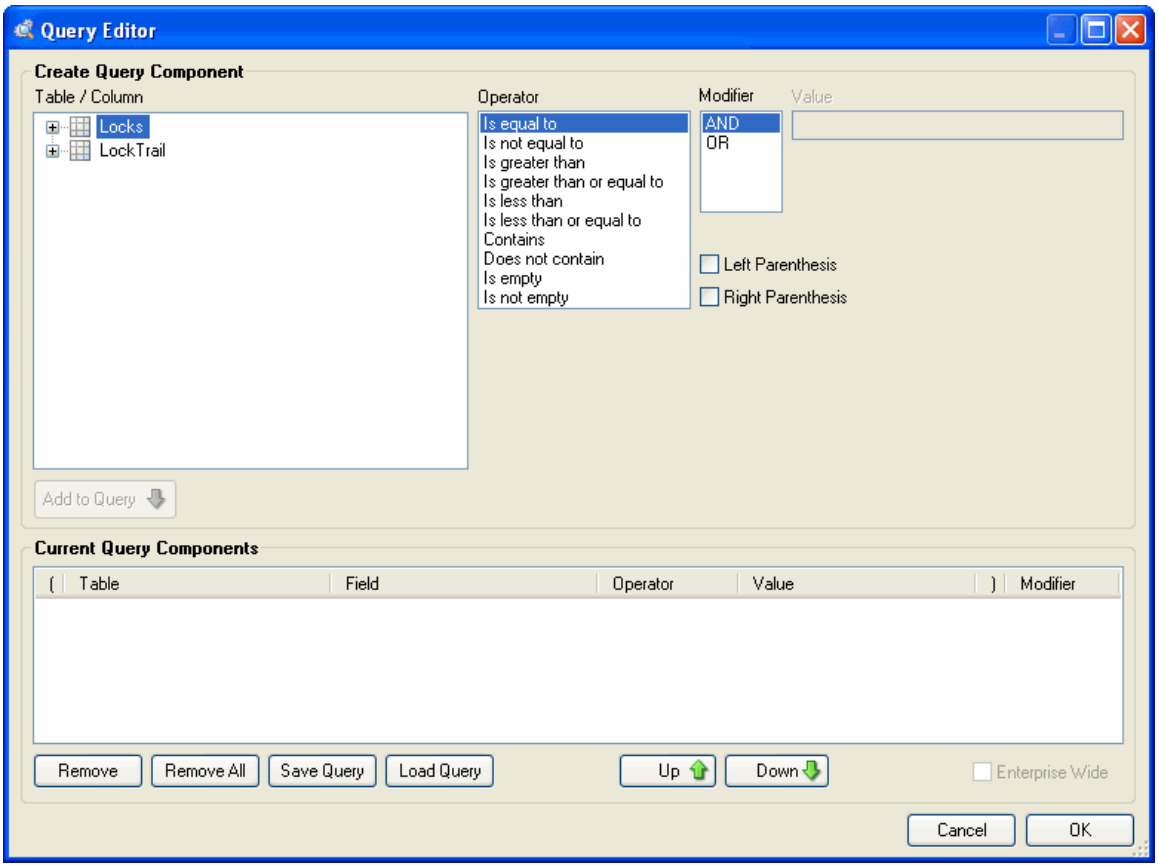
Remarks	Keys	KeyHook_ID	KeyHooks	Remarks
Selected Key Hook				
History (Hook)				
Transaction Type				
Transaction Date				
Action Date				
User Name				
Remarks				
Hooks and Rings Tab				
Key Ring ID	Keys	KeyRing_ID	KeyRings	KeyRingID
Holder ID				
Holder Name				
Issued	Keys	KeyRing_ID	KeyRings	DateIssued
Remarks	Keys	KeyRing_ID	KeyRings	Remarks
Selected Key Ring				
History (Ring)				
Transaction Type				
Transaction Date				

Action Date				
User Name				
Remarks				
History Tab				
Transaction Date				
Transaction Type				
Person				
Issued				
Retrieved				
User Name				
Remarks				

Locks - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Locks

The table below lists fields in the Locks module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
LockID	Locks	LockID		
Type	Locks	LockType_ID	LockType	LockType
Description	Locks	Description		
Custodian (Personnel)	Locks	Custodian_Personnel_ID	VisitAuthorizationVisitors	VisitorID
Custodian (Visitor)	Locks	Custodian_VisitAuthorizationVisitors_ID		
Issued By (Personnel)	Locks	IssuedBy_Personnel_ID	Personnel	PersonnelID
Issued By (Visitor)	Locks	IssuedBy_VisitAuthorizationVisitors_ID	VisitAuthorizationVisitors	VisitorID
Facility	Locks	Facility_ID	Facility	FacilityID
Data Group	Locks	UserGroup_ID	UserGroups	GroupName
Classification	Locks	Classification_Level_ID	Levels	Name
Maker	Locks	LockMaker_ID	LockMaker	LockMaker
Status	Locks	LockStatus_ID	LockStatus	LockStatus

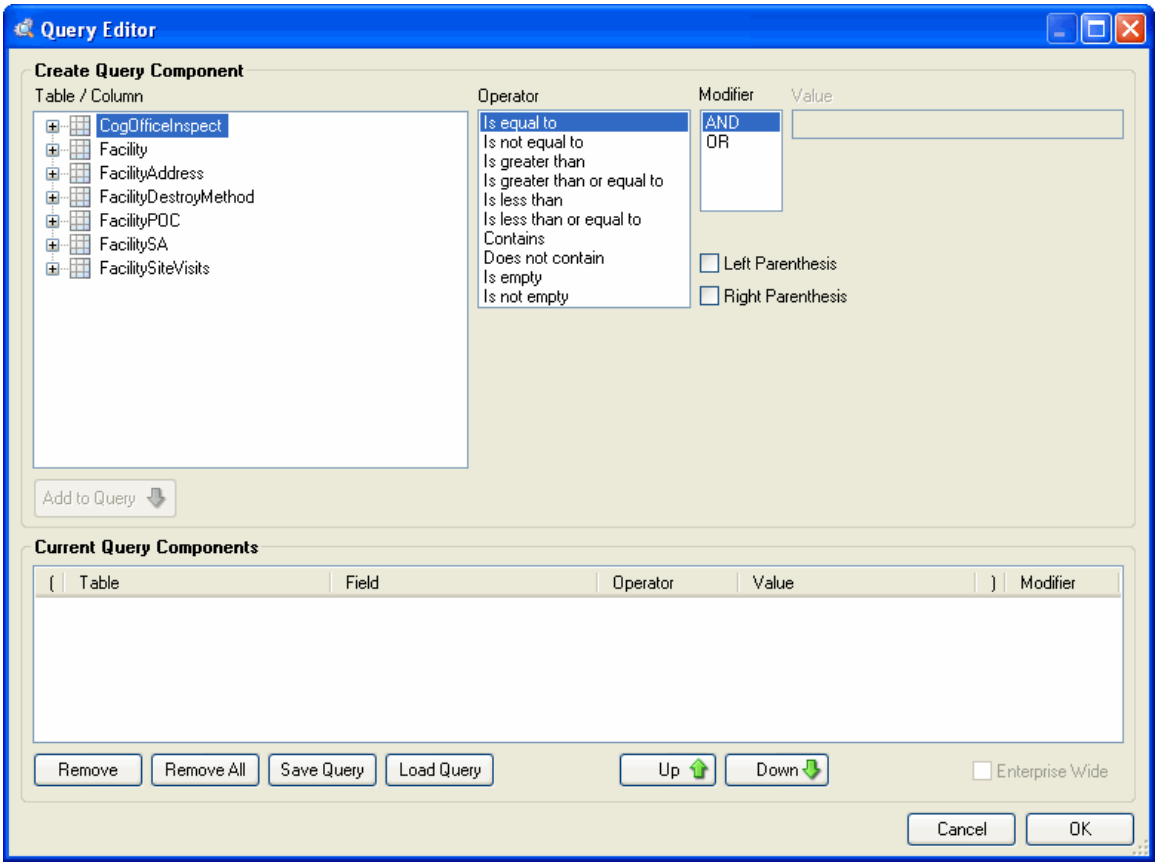
Serial #	Locks	SerialNumber		
Base Key ID	Locks	LockType_ID	BaseKeyID	
Location	Locks	ContainerLocation_ID	ContainerLocation	ContainerLocation
Inventoried	Locks	InventoryDate		
Issue Date	Locks	IssuedDate		
Inactive	Locks	Inactive		
Copy Number				
Current Holder				
Status				
Issued				
Retrieved				
Master				
Keys Shown				
History Tab				
Copy Number				
Current Holder				
Status				
Issued				
Retrieved				
Master				
Keys Shown				

Remarks Tab				
Remarks Tab	Locks	Remarks		

Other Facilities - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.

Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.
Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Other Facilities

The table below lists fields in the Other Facilities module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
ID	Facility	FacilityID		
Name	Facility	FacilityName		
Type	Facility	FacilityType		
Inactive	Facility	Inactive		
Govt Facility	Facility	IsGovtFacility		
International	Facility	International		
Cognizant Office	Facility	CogOffice_ID	CogOffice	Cog_Code

Convenience Code	Facility	ConvienceCode		
Data Group	Facility	UserGroup_ID	UserGroups	GroupName
Address Line #1	FacilityAddress	Line1		
Address Line #2	FacilityAddress	Line2		
Address Line #3	FacilityAddress	Line3		
Address Line #4	FacilityAddress	Line4		
Address Phone	FacilityAddress	Phone		
Contact Name				
Contact Telephone				
FAX				
Secure Phone	FacilityAddress	SecurePhone		
Emergency Phone	FacilityAddress	EmergencyPhone		
Facility Security Officer - Name	Facility	SecurityOfficer		
Facility Security Officer - Phone	Facility	FSOPhone		
Facility Security Officer - e-mail	Facility	FSOEmail		
Clearance Level	Facility	Clearance_Level_ID	Levels	Name
Storage Level	Facility	StorageLevel_ID	Levels	Name
Granted	Facility	ClearanceGrantDate		
Verified	Facility	SPPDate		
FOCI	Facility	FOCI		
Next Check	Facility	NextVerify		

Other Addresses Tab				
Address Type	FacilityAddress	PrimaryAddress		
Header	FacilityAddress	Header		
Address Line #1	FacilityAddress	Line1		
Address Line #2	FacilityAddress	Line2		
Address Line #3	FacilityAddress	Line3		
Address Line #4	FacilityAddress	Line4		
Footer	FacilityAddress	Footer		
Fax #1	FacilityAddress	Fax1		
Fax #2	FacilityAddress	Fax2		
Fax #3	FacilityAddress	Fax3		
Secure Phone	FacilityAddress	SecurePhone		
Emergency Phone	FacilityAddress	EmergencyPhone		
Address Phone	FacilityAddress	Phone		
Contact	FacilityAddress	Contact_Name		
Position	FacilityAddress	Contact_Position		
Phone	FacilityAddress	Contact_Phone		
Notes	FacilityAddress	Contact_Notes		
CogOffices Tab				
CogOffice Name	Facility	CogOffice_ID	CogOffice	Name
Address 1	Facility	CogOffice_ID	CogOffice	Address1
Address 2	Facility	CogOffice_ID	CogOffice	Address2

Address 3	Facility	CogOffice_ID	CogOffice	Address3
Phone	Facility	CogOffice_ID	CogOffice	Phone
FAX	Facility	CogOffice_ID	CogOffice	FAX
CogInspections Tab				
Cognizant Field Office	Facility	CogFieldOffice_ID	CogOffice	Cog_Code
Cognizant Resident Office	Facility	CogResidentOffice_ID	CogOffice	Remarks
Cog Office Rep	Facility	CogRep		
Cog Inspection Date	Facility	CpInspDate		
Rating	Facility	LastInspectDate		
Cog Office Rep	Facility	LastInspectBy		
Remarks	Facility	LastCogVisitRem		
Next Facility Inspection	Facility	NextCogInspect		
Access Control Tab				
Employees	Facility	EmployeeBadging		
Visitors	Facility	VisitorBadging		
Vendors	Facility	VendorBadging		
Temporary Help	Facility	TempBadging		
Contractors	Facility	ContractBadging		
Accountability System				

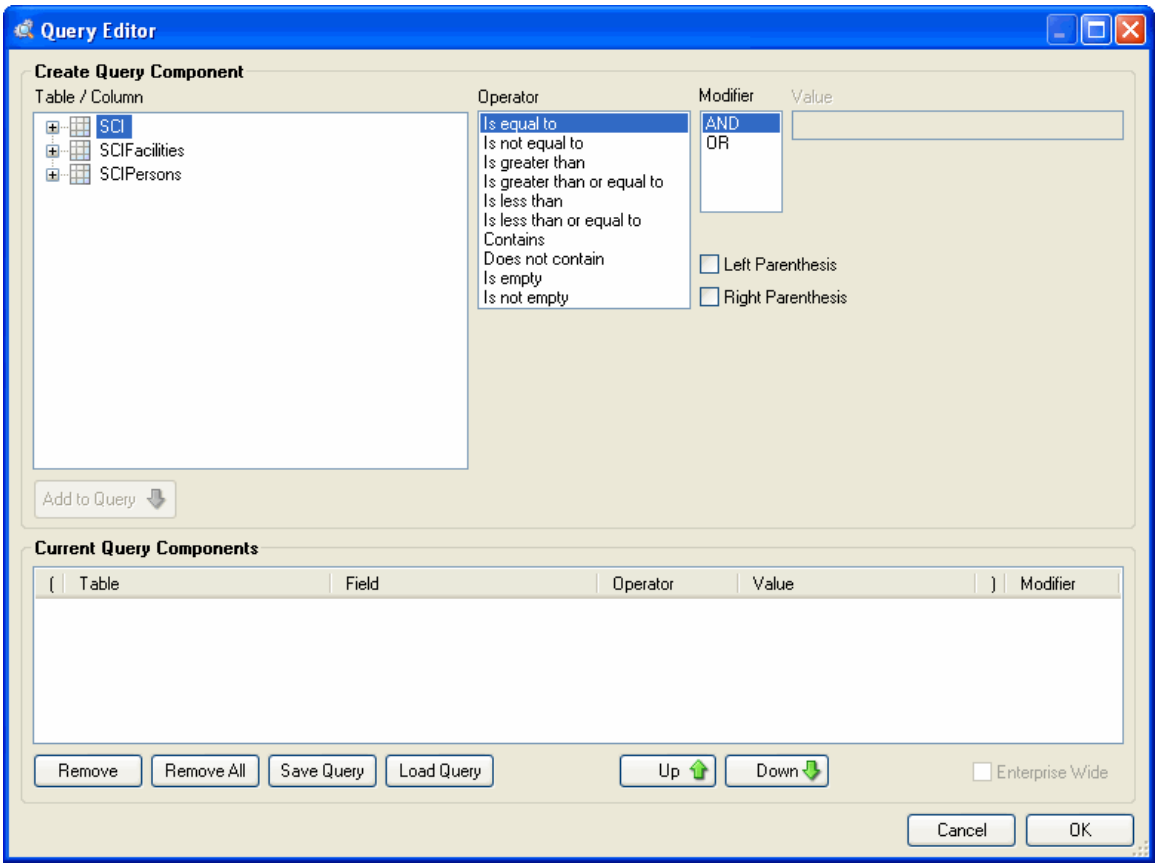
Visitor Control	Facility	VisitorControl_ID	VisitorControl	VisitorControl
Approved by DSS for FedEx	Facility	DSSFedexOK		
Classified AIS	Facility	ClassifiedAIS		
SAP/SAR	Facility	SAPSAR		
Protected Areas	Facility	ProtectedAreas		
NRC	Facility	NRC		
STU III	Facility	STUIII		
Perimeter Control	Facility	PerimControl		
DOE FCL	Facility	DOEFCL		
Closed Areas	Facility	ClosedAreas		
Special Accesses	Facility	SA_ID	SA	SAName
Key Security Personnel Tab				
Facility Security Officer Name	Facility	SecurityOfficer		
Start Date	Facility	FSOStartDate		
E-mail	Facility	FSOEmail		
Phone	Facility	FSOPhone		
Facility Manager Name	Facility	FacManager		
Phone	Facility	FacManagerPhone		
Staff Member Name	Facility	StatMemName		
Phone	Facility	StatMemPhone		

Key Security Personnel Report Date	Facility	KSPDate		
Awards Tab				
Awards	Facility	Awards		
Awards - notes	Facility	AwardNotes		
Remarks Tab				
Remarks	Facility	Remarks		

SCI Outgoing Requests - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.

Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

SCI Outgoing Requests

The table below lists fields in the SCI Outgoing Requests module. The subsequent columns list where the field can be found in the Query Editor.

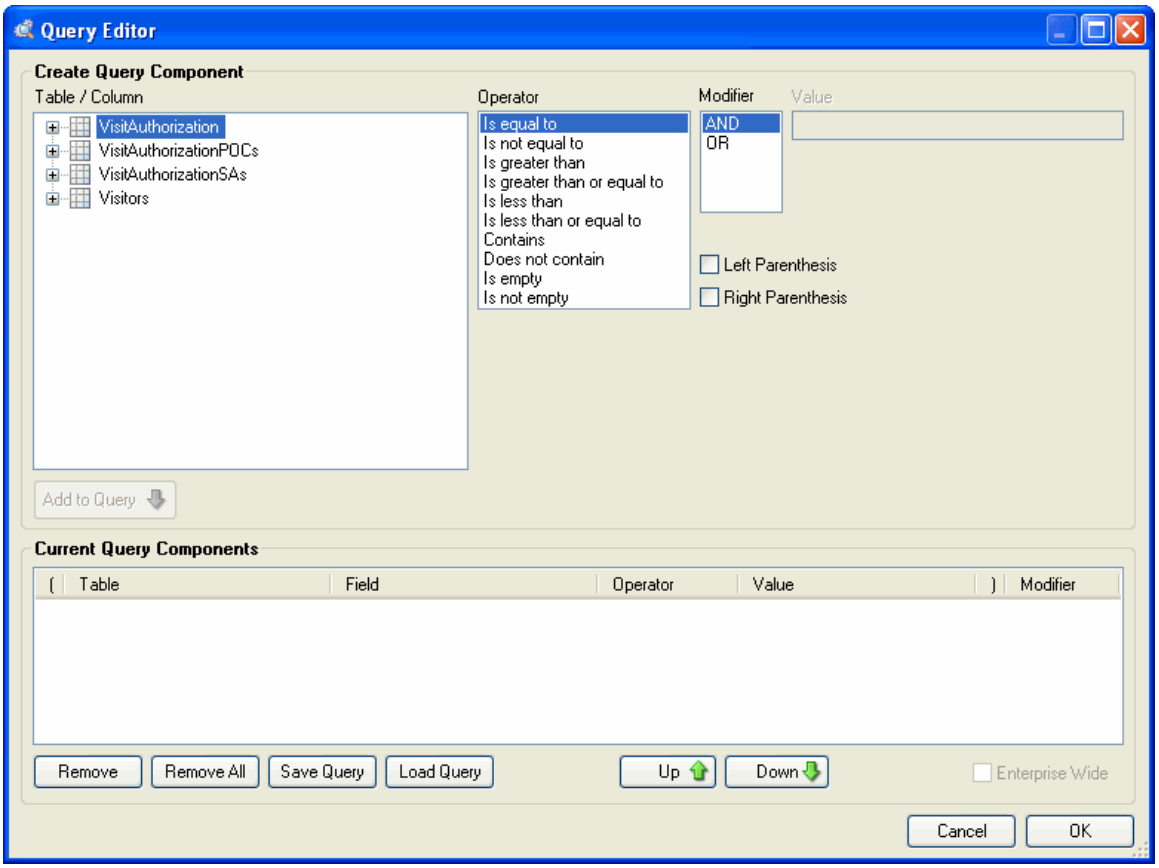
Home Tab				
Classification	SCI	Levels_ID	Levels	Name
Type	SCI	Type		
From	SCI	FromDate		
To	SCI	ToDate		
Note	SCI	PermCertText		
Company Code	SCI	CompanyCode		
Access Date	SCI	CertAccessDate		
Data Group	SCI	UserGroup_ID	UserGroups	GroupName
From Facility	SCI	Facility_ID	Facility	FacilityID
To Facility				
Purpose	SCI	Purpose		
Visitors Tab				
ID	SCIPersons	Personnel_ID	Personnel	PersonnelID

Name	SCIPersons	Personnel_ID	Personnel	LastName/FirstName/MiddleName
Position	SCIPersons	Personnel_ID	Position_ID	PersonnelPosition > Position
DOB	SCIPersons	Personnel_ID	BirthDate	
POB	SCIPersons	Personnel_ID	BirthPlace	
Rank	SCIPersons	Personnel_ID	GradeRankRate	
Access Type	SCIPersons	Type		
Endorsement Tab				
Facility Name				
Address 1	SCI	Endorse_FacilityAddress_ID	FacilityAddress1	
Address 2	SCI	Endorse_FacilityAddress_ID	FacilityAddress2	
Address 3	SCI	Endorse_FacilityAddress_ID	FacilityAddress3	
Facilities Tab				
Facility Name				
Address 1	SCIFacilities	FacilityAddress_ID	FacilityAddress	Line1
Address 2	SCIFacilities	FacilityAddress_ID	FacilityAddress	Line2
Address 3	SCIFacilities	FacilityAddress_ID	FacilityAddress	Line3
Address 3	SCIFacilities	FacilityAddress_ID	FacilityAddress	Line4
POC	SCIFacilities	FacilityAddress_ID	FacilityAddress	Contact_Name
POC Phone	SCIFacilities	FacilityAddress_ID	FacilityAddress	Contact_Phone

Visit Authorizations - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	Description
Tables	Select the table type.
Fields	Select the field within the selected table type.
Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.

Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.
Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Visit Authorizations

The table below lists fields in the Visit Authorizations module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
Valid From	VisitAuthorization	FromDate		
Valid To	VisitAuthorization	ToDate		
Visit Auth #	VisitAuthorization	VisAuthNumber		
Classified Visit	VisitAuthorization	ClassifiedVisit		
Sending Fac. Visit Auth #	VisitAuthorization	SendFacVisAuthNum		
Conference	VisitAuthorization	Conference_ID	Conference	ConferenceID
Contract	VisitAuthorization	Contract_ID	Contract	ContractID
Contact ID (Personnel)	VisitAuthorization	Personnel_ID	Personnel	PersonnelID

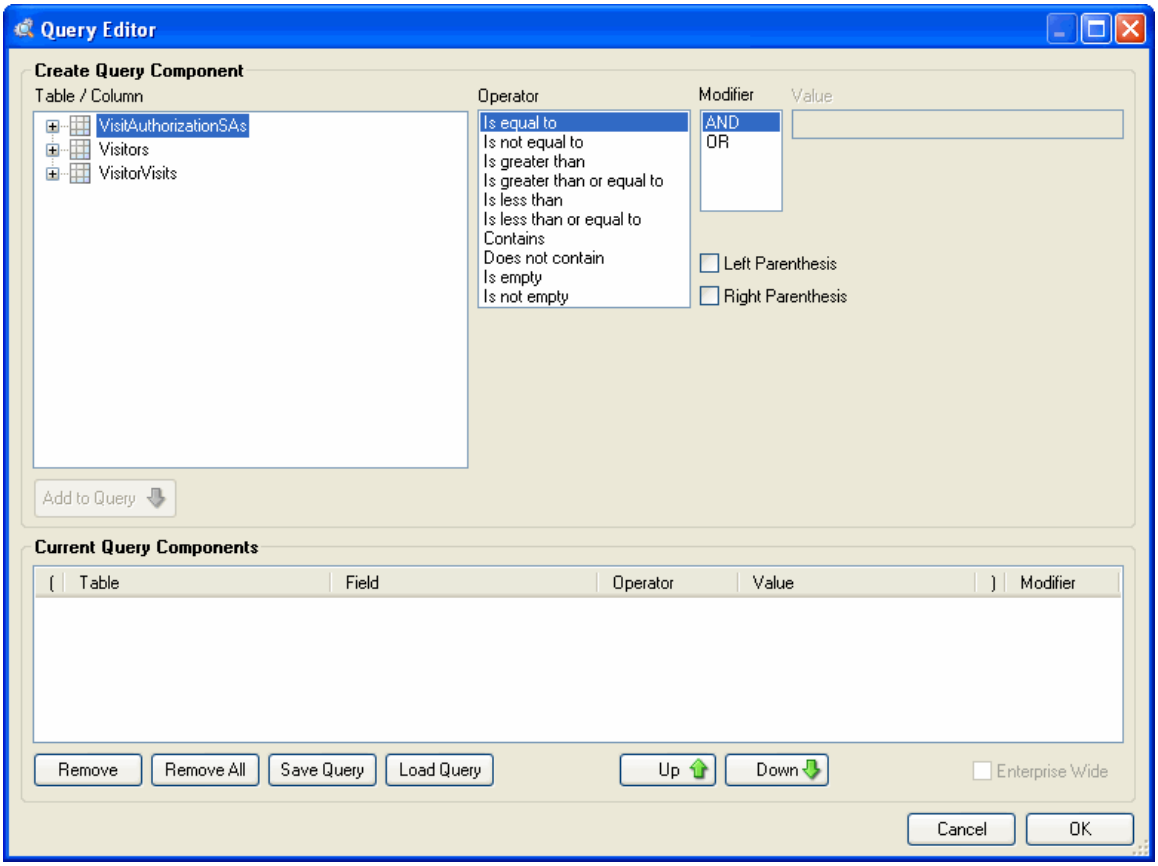
Contact ID (Visitor)	VisitAuthorization	VisitAuthorizationVisitors	VisitAuthorizationVisitors_ID	VisitorID
Contact Name (Personnel)	VisitAuthorization	Personnel_ID	Personnel	LastName/FirstName/MiddleName
Contact Name (Visitor)	VisitAuthorization	VisitAuthorizationVisitors	VisitAuthorizationVisitors_ID	LastName/FirstName/MiddleName
Contact Phone (Personnel)	VisitAuthorization	Personnel_ID	Personnel	WorkPhone
Contact Phone (Visitor)	VisitAuthorization	VisitAuthorizationVisitors	VisitAuthorizationVisitors_ID	ContactPhone
Hardcopy Confirm	VisitAuthorization	HardCopyConfirmed		
NATO	VisitAuthorization	NATOVisit		
Contractual	VisitAuthorization	Contratual		
Data Group	VisitAuthorization	UserGroup_ID	UserGroups	GroupName
Received	VisitAuthorization	ReceivedDate		
Received How				
Sending Facility ID				
Sending Facility Name				
Host Facility Visited	VisitAuthorization	HostFacility_ID	Facility	FacilityID
Purpose	VisitAuthorization	Purpose		
Sending Facility Tab				
Sending Facility ID				
Sending Facility Name				

Remarks Tab				
Remarks	VisitAuthorization	Remarks		

Visitors - Using Query Editor

The Query Editor allows complex searches. It searches the current data file and displays only the records that fit the search conditions that you specify.

Click **Query Editor**  at the bottom of any output list screen. The Query Editor dialog box appears:



Query Editor Screen Fields

Field Name	**Description**
Tables	Select the table type.
Fields	Select the field within the selected table type.

Operator	The value definition.
Modifier	Select 'AND' to include all parameters or 'OR' to include one or more of the parameters in the query results.
Value	Specify a date, number, or text for the 'Operator' parameter.
Add to Query	Click to add the selected parameter combination to the list box in the lower portion of the screen. Repeat to create a list of multiple parameter combinations.
Remove	Click to delete a selected row of parameters.
Remove All	Click to delete all rows of parameters.
Save Query	After selecting this button, a Save dialog will appear. Save the query so that it can be reloaded for later use.
Load Query	After selecting this button, an Open dialog will appear. Select a query file that was saved at an earlier time. The query must be loaded in the same module in which it was saved.
OK	Click to start the search.
Cancel	Click to close the screen.

Visitors

The table below lists fields in the Visitors module. The subsequent columns list where the field can be found in the Query Editor.

Home Tab				
ID	VisitAuthorizationVisitors	IDValue		
U.S. Citizen	VisitAuthorizationVisitors	USCitizen		
SSN	VisitAuthorizationVisitors	SSN		
Last Name	VisitAuthorizationVisitors	LastName		

First Name	VisitAuthorizationVisitors	FirstName		
Middle Name	VisitAuthorizationVisitors	MiddleName		
Suffix	VisitAuthorizationVisitors	NameSuffix		
Position	VisitAuthorizationVisitors	Position_ID	PersonnelPosition	Position
Ttile	VisitAuthorizationVisitors	Title		
Rank	VisitAuthorizationVisitors	Rank		
Visitor Type	VisitAuthorizationVisitors	VisitorType_ID	VisitorType	VisitorType
ID Type	VisitAuthorizationVisitors	VisitorIDType_ID	VistiorIDType	Name
ID Value	VisitAuthorizationVisitors	IDValue		
Valid From	VisitAuthorizationVisitors	VisitAuthorization_ID	VisitAuthorization	FromDate
To	VisitAuthorizationVisitors	VisitAuthorization_ID	VisitAuthorization	ToDate
Clearance Level	VisitAuthorizationVisitors	Levels_ID	Levels	Name
Terminated	VisitAuthorizationVisitors	DateTerminated		
Added	VisitAuthorizationVisitors	DateAdded		
Govt Facility	VisitAuthorizationVisitors	GovtFacility		
Long Term	VisitAuthorizationVisitors	LongTerm		

Escort Required	VisitAuthorizationVisitors	EscortRequired		
Need to Know	VisitAuthorizationVisitors	NeedtoKnow		
Security Dept Approval	VisitAuthorizationVisitors	SecurityDeptApproval		
From Facility				
Host Facility	VisitAuthorizationVisitors	HostFacility_ID	Facility	FacilityID
Contact Name	VisitAuthorizationVisitors	ContractName		
Contact Phone	VisitAuthorizationVisitors	ContactPhone		
Escort Name	VisitAuthorizationVisitors	EscortName		
Escort Required	VisitAuthorizationVisitors	EscortRequired		
Conference	VisitAuthorizationVisitors	Conference_ID	Conference	ConferenceID
Contract	VisitAuthorizationVisitors	Contract_ID	Contract	ContractID
Courier	VisitAuthorizationVisitors	AuthCourier		
Destroy	VisitAuthorizationVisitors	AuthDestroy		
Transfer	VisitAuthorizationVisitors	AuthTransfer		
Visit Auth Number	VisitAuthorizationVisitors	VisitAuthorization_ID	VisitAuthorizationSendMethod_ID	VisitAuthNumber
Data Group	VisitAuthorizationVisitors	UserGroup_ID	UserGroups	GroupName

Clearance Info Tab				
Level	VisitAuthorizationVisitors	Levels_ID	Levels	Name
Type	VisitAuthorizationVisitors	ClearanceType_ID	PersonnelClearanceType	ClearanceType
Basis	VisitAuthorizationVisitors	ClearanceBasis_ID	PersonnelClearanceBasis	ClearanceBasis
Billet	VisitAuthorizationVisitors	BilletNumber		
Granted By	VisitAuthorizationVisitors	ClearanceGrantedBy		
Briefed	VisitAuthorizationVisitors	ClearanceBriefDate		
Granted	VisitAuthorizationVisitors	ClearanceGrantDate		
Expriation	VisitAuthorizationVisitors	ClearExpiration		
Investigated	VisitAuthorizationVisitors	ClearanceInvestDate		
Periodic Reinvestigation	VisitAuthorizationVisitors	PeriodicReinvest		
Purpose	VisitAuthorizationVisitors	Purpose		
SpecialAccesses				
Personal Info Tab				
Birth Date	VisitAuthorizationVisitors	BirthDate		
Place	VisitAuthorizationVisitors	BirthPlace		

Height	VisitAuthorizationVisitors	Height		
Weight	VisitAuthorizationVisitors	Weight		
US Citizen	VisitAuthorizationVisitors	USCitizen		
Vehicle ID	VisitAuthorizationVisitors	VehicleID		
Country of Citizenship	VisitAuthorizationVisitors	Citizenship_Country_ID	Country	Country
Work Visa #	VisitAuthorizationVisitors	WorkVisaNum		
Naturalization #	VisitAuthorizationVisitors	NationalizationNum		
Registered Alien #	VisitAuthorizationVisitors	RegisteredAlienNum		
Passport Country	VisitAuthorizationVisitors	Passport_Country_ID	Country	Country
Passport City	VisitAuthorizationVisitors	PassportCity		
Passport State	VisitAuthorizationVisitors	PassportState		
Passport Number	VisitAuthorizationVisitors	PassportNum		
Issued	VisitAuthorizationVisitors	PassportIssued		
Expires	VisitAuthorizationVisitors	PassportExpire		
From Facility Tab				
Facility Name				

Address 1	VisitAuthorizationVisitors	FacilityAddress	Line1	
Address 2	VisitAuthorizationVisitors	FacilityAddress	Line2	
Address 3	VisitAuthorizationVisitors	FacilityAddress	Line3	
Address 4	VisitAuthorizationVisitors	FacilityAddress	Line4	
Phone	VisitAuthorizationVisitors	FacilityAddress	Phone	
Visiting Data Tab				
Date				
Time In				
Badge #				
Escort Name				
Building				
Classified Visit				
Badge Return				
Time Out				
Parking				
Visit Auth #				
Room #				
Badge Info				
Badge Number	VisitAuthorizationVisitors	BadgeNumber		

Group				
Color	VisitAuthorizationVisitors	Badge_Color_ID	Color	Color
Security Contact				
Date	VisitAuthorizationVisitors	BadgeDate		
Expiration	VisitAuthorizationVisitors	BadgeExpiration		
Remarks Tab				
Remarks	VisitAuthorizationVisitors	Remarks		